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And They Were There -- Reports of Meetings -- 25th Charleston Conference Issues in Book and Serial Acquisition, "Things Are Seldom What They Seem," Francis Marion Hotel and Embassy Suites Historic District, Charleston, SC, November 2-5, 2005

Editor

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And They Were There

Reports of Meetings — 25th Charleston Conference Issues in Book and Serial Acquisition, “Things Are Seldom What They Seem,” Francis Marion Hotel and Embassy Suites Historic District, Charleston, SC, November 2-5, 2005

Column Editor: **Sever Bordeianu** (University of Mexico) <sbordeia@unm.edu>

*From your Editor: The 2005 Charleston Conference was fabulous! Many thanks to **Ramune Kubilius** and all her **ATG** reporters who submitted reports. If you attended the **Conference** and want to submit a report, please email it to **Ramune** at <r-kubilius@northwestern.edu> or to <kstrauch@comcast.net>. The entire 2005 Charleston Conference Proceedings will be published by **Libraries Unlimited/Greenwood Publishing Group** later this year, watch for details in an upcoming **ATG** issue. — **KS***

Lively Lunch — Thursday, November 3, 2005, Laurens, Francis Marion — *A Longitudinal Study of Statewide Interlibrary Loan Article Sharing in Illinois: How Are Electronic Journals Affecting Interlibrary Loan?* — Presented by **Lynn N. Wiley** (Head of Information Service Delivery & Entrepreneurial Programs, Univ. of Illinois at Urbana Champaign), **Tina Chrzastowski** (Head, Chemistry Library, Univ. of Illinois Champaign)

Report by **Joslin Tepper** (USC Student)
<Coxje3@mailbox.sc.edu>

The speakers spent 10 years working on three studies that compared Interlibrary Loan sharing data from 26 libraries in Illinois. This project focused on photocopies shared through Interlibrary Loan, monographs were not looked at. The speakers acquired the data from the 26 libraries through the **OCLC Management Statistics Service**. The participating libraries gave their consent for the speakers to use the data. The study showed that a drop in Interlibrary Loan sharing occurred starting around 1999. The probable reason for this drop was the increase in the amount of journals available online. This study proved that the availability of online access is changing Interlibrary Loans. Many of the questions



asked at the end of this session were for more information about specific charts shown. A question was asked about the difference be-

tween graduate and undergraduate Interlibrary Loan use. The speakers answered that the study showed that graduate students used the Interlibrary Loan service the most, undergraduate students were more likely to use online resources. The speakers are planning to have this study published sometime within the year.

Session — Thursday, November 3, 2005, Colonial Ballroom West, Embassy Suites — *Removing the Fat or Shifting the Weight Around: A Study of Cancellation Trends* — Presented by **Janet H. Fisher**, Moderator (Senior Publishing Consultant, Publishers Communication Group), **Joshua Clarke** (Head of Research and Analyst, Publishers Communication Group), **Bob Persing** (Head of Serials, University of Pennsylvania Library), **Anna Fleming** (Library Relations Manager, The University of Chicago Press)

Report by **Joslin Tepper** (USC Student)
<Coxje3@mailbox.sc.edu>

Joshua Clarke discussed the results of a two year study the **Publishers Communication Group** had done on subscription cancellations. The study found that the three major reasons libraries cancelled subscriptions were: low use, format changes, and budget problems. It also found that many libraries will cancel print subscriptions if they are available electronically; this generally is because of their budget. **Bob Persing** discussed how the **University of Pennsylvania Library** addressed the question of whether to switch to electronic subscriptions when available. One way this was addressed was to participate in one of the “Big Deals.” **Anna Fleming** discussed how the **University of Chicago Press** was addressing this issue and asked the audience for input on whether there is interest in promoting usage of material and how usage could be promoted.

Session — Thursday, November 3, 2005, Colonial Ballroom East, Embassy Suites — *Embedded Digital Objects and the Future of Academic Journal Publishing* — Presented by **Greg Mitchell** (Assistant Director for Resource Management, University of Texas Pan American Library), **Tamara Remhof** (Collection Development Librarian, South Texas College)

Report by **Sandy Riggs** (SLIS Student, University of South Carolina) <sandyrusc@yahoo.com>

This session focused on the opportunities to be found in the move from plain text to an “enriched media environment” using embedded digital objects in scholarly publishing. The speakers discussed the advantages of multimedia, including the ability to use video to illustrate movement, the enhancement of nonverbal communication through multimedia, and the idea that a picture is worth a thousand words. The speakers pointed out that the technology to incorporate multimedia into electronic journals is becoming cheaper as the quality of that technology is increasing. Potential problems such as technology restrictions and compatibility, cultural and psychological issues, and legal concerns were mentioned. The speakers also pointed out that certain disciplines would be better served by embedded digital objects than others due to the nature of the field. The speakers went over the results of a survey they conducted of ten publishers.

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Charleston Conference Future Dates

	<u>Preconferences & Vendor Showcase</u>	<u>Main Conference</u>
2006 Conference	8 November	9-11 November
2007 Conference	7 November	8-10 November
2008 Conference	5 November	6-8 November
2009 Conference	4 November	5-7 November
2010 Conference	3 November	4-6 November

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Of the three publishers who responded, two were looking at and thinking about embedded digital objects and one definitely saw the use of embedded digital objects as a "viable future for publishing." Other topics discussed were the technological and editorial costs of publishing with embedded digital objects, compatibility issues with Linux machines, the problem of the technology changing so rapidly that the software used for the files may become obsolete, the hesitance of publishers and authors to embrace the new technology, and the fact that many people access the journal articles electronically but actually print them out and read the hard copies, thereby making the embedded digital objects less useful.

Session — Thursday, November 3, 2005, Carolina Ballroom,
Francis Marion — *Letting the Right Things Slide:
Balancing the Demands of Print and Electronic Resources* —
Presented by **Albert Joy**, Moderator (Acquisitions/Preservation
Librarian, University of Vermont), **Robert Behra**
(Senior Library Specialist, J. Willard Marriott Library,
University of Utah), and **Rick Lugg** (R2 Consulting)

Report by **Katherine L. Latal** (Head, Acquisitions Services
Department, University at Albany, University Libraries, LIB 34)
<KLatal@uamail.albany.edu>

The genesis for this debate session was the exchange of ideas between **Rick Lugg** and **Robert Behra** in recent issues of *ATG*. How librarians can balance the completion of "legacy tasks" while adding on "new stuff" brought on by the explosion of electronic resources was the central issue.

Discontinuing print periodical check-in and claiming was the first issue addressed. Arguments in support of this included that staff should maintain URLs and add links instead and the intensified demand for electronic products. **Mr. Behra** found this acceptable as long as users have access to the exact same thing: full-text with no embargos and guaranteed perpetual archives. Audience members argued that libraries are financially accountable making proof of receipt still valid. **Mr. Lugg** suggested only checking-in expensive titles as a good compromise.

Reducing the treatment of donated materials, especially when faced with a huge influx of gifts, was the second issue addressed. There was general agreement that gifts are not truly free; costs of cataloging and processing are high. Both speakers stressed the importance of advising donors of the library's gifts policy. The session ended with the caveat that librarians must learn to prioritize what they do and let some things slide.

Session — Thursday, November 3, 2005, Pinckney,
Francis Marion — *Cooperative Monographic Collection
Development, Pt. 1 — Recent Developments in Cooperative
Collection Development at OhioLINK* — Presented by
Julia Gammon (Chair, Collection Building Task Force,
OhioLINK, Head, Acquisitions Department, University of
Akron), **Michael Zeoli** (Regional Manager, Eastern Region,
ebrary, formerly of YBP Library Services)

Report by **Katherine L. Latal** (Head, Acquisitions Services
Department, University at Albany, University Libraries, LIB 34)
<KLatal@uamail.albany.edu>

Ms. Gammon and **Mr. Zeoli** presented how **OhioLINK** (85 libraries) formed a taskforce in 1998 and worked with **YBP Services** to develop a consortium for purchasing monographs that benefits both the libraries and the vendor. New technology, shrinking budgets, lack of staff, and the increasing number of instances where five or

more copies of a title were added statewide, while the **ILL** unfill rate also increased, were the impetus for this joint project. Now, all eighty-five libraries are able to view each library's purchases via **YBP's** and **GOBI2** database and reports. Titles that are not purchased by any of the libraries are sent to them in a report for their consideration.

Practical nuts and bolts tips were shared to help other libraries create the same type of consortial arrangement. The presenters emphasized that changes in purchasing patterns happen over time, not instantly. Each consortial group will be unique; it is not a one size fits all approach. In the future this consortium may be expanded to include monographic standing orders or continuations with a another vendor. This consortium seems to be a win-win situation for **OhioLINK** and **YBP**.

Session — Thursday, November 3, 2005, Rutledge,
Francis Marion — *The Landscape of Scholarly
Communication: How Readers Navigate To Content* —
Presented by **Simon Inger** (Director, Scholarly
Information Strategies Ltd.)

Report by **Karen Fischer** (University of Iowa)
<karen-fischer@uiowa.edu>

Simon Inger reported on eight months of research gathered in a survey of 30,000 researchers and 5,000 librarians worldwide, with the intention that the information would help inform the development of a new **Metapress** platform (**Metapress** commissioned the research).

The research shows that readers are arriving at journal content in new ways due to technologies such as link resolvers, federated search, RSS feeds, and email TOC alerts. Understanding the common routes readers take to get to journal content can help inform publishers on how to best design their journal Websites and can help librarians better understand how their patrons navigate content.

There were three main forms of reader behavior that were identified: citation searching, core journal browsing, and subject searching. For citation searching most users begin at a library Website or a specialized bibliographic database. For core journal browsing, the overwhelmingly most used access point to content was through email Table of Contents alerts from journal publishers, and in second was the journal's home page. When looking for content by subject the most popular avenue is specialized bibliographic databases, and second was a search engine (such as **Google.com**).

Inger also reported that personalization and discussion list forums were of little interest to users. Some of the important features of a publisher's Website that should be considered: easily searchable, easily browsable, reference linking, open URL and TOC alert services.

This full report is available in a Cadmus whitepaper:
www.scholinfo.com/report/The_changing_landscape_of_scholarly_communications.pdf.

Session — Thursday, November 3, 2005, Laurens, Francis
Marion — *How Users Navigate E-Journal Platforms* —
Presented by **Marthyn Borghuis** (Senior Manager
ScienceDirect & Scopus Usage Research, Elsevier)

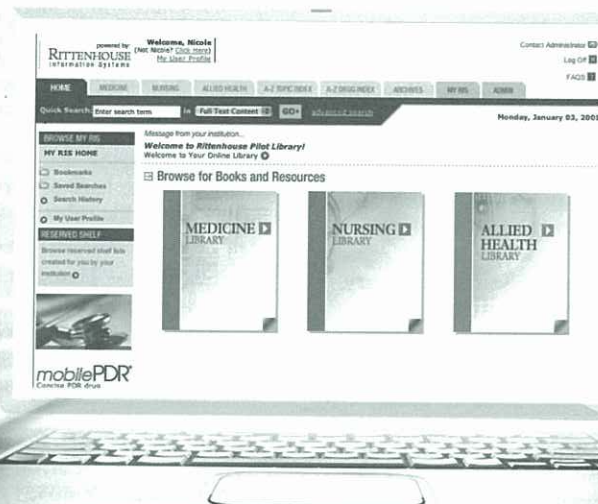
Report by **Karen Fischer** (University of Iowa)
<karen-fischer@uiowa.edu>

Borghuis presented results of a study done by **Elsevier** based on five years of **ScienceDirect** usage data. The goal of the study is to bring users to content with a minimal number of mouse-clicks and to avoid many different interfaces. Today users expect a full-text link to an article as well as mutual linking among many different platforms, such as **A&I** databases, **OPAC**, email alerts and citation indexes.

The presenter reviewed many detailed graphs filled with data.

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Expand Your Library Beyond the Bookshelves



The R2 Library is a web-based application that aggregates monographic content from multiple publishers on the desk top for your patrons.

Visit the Library Services page on www.rittenhouse.com to take a test drive.



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Most users come to journal home pages on **ScienceDirect** from a library Website or link resolver software used by the library (86%). Referrals from other Websites to **ScienceDirect** articles came primarily from **PubMed** (35.2%), **Cell Press** (17%) and from library Websites and link resolvers (12.4%).

Borghuis concluded by summarizing that improvements to library Websites and linking software means that users are finding more full-text articles and more quickly. The **ScienceDirect** usage data shows the importance of good library Websites, good linking software and the need for strong **A&I** databases.

Lively Lunch — Thursday, November 3, 2005, Colonial Ballroom West, Embassy Suites — *Things Are Seldom What They Seem, and We Try To Predict What They Will Be: 5th Annual Lively Lunch On Issues In Health Science Collection Development* — Presented by

Ramune Kubilius, Moderator (Collection Development / Special Projects Librarian, Galter Health Sciences Library, Northwestern University), **Lynn M. Fortney** (Vice President, Director, Biomedical Division, EBSCO Information Services), **Jeffrey Coghill** (Collection Dev. & Electron. Resources Librarian, East Carolina U. William E. Laupus Health Sciences Library)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

Ramune Kubilius (Collection Development / Special Projects Librarian, Galter Health Sciences Library, Northwestern University)

organized / moderated this (and previous years') "Lively Lunch." 2005 was the year of two **PowerPoint** presentations (with Q & A), rather than more casual, lunch-eating, facilitator - participant discussions of the past. Attendance (40+) indicated that the gatherings still hold some appeal. **R. Kubilius'** handout (compiled with **Liz Lorbeer** of **Rush University**), highlighted biomedical collection world developments since Nov. 2004. **Jeffrey Coghill** (Collection Dev. & Electron. Resources Librarian, East Carolina U. William E. Laupus Health Sciences Library) described his experience as a library selector for two annual "editions" of the *Doody Core Titles* in the Health Sciences (editor **Dan Doody** introduced the undertaking at **CC's 2004 Lively Lunch**). **J. Coghill** described the *DCT* title selection / review that has automated the core title selection process, improved methodologies, included faculty and librarian reviewers. *DCT* seeks to enhance the biomedical collection tool concept exemplified by the now ceased Brandon / Hill core titles lists. Caveats to work on *DCT*? Short turnaround time (initial scoring to follow-up is one month) for selectors (**J. Coghill** covers six subjects!) *DCT* enhancements? Explore a better / different scoring system. Participants asked if *DCT* may grow to include a journals component (maybe?) and argued (pro and con) about the utility of core lists for experienced collection development librarians. **Lynn M. Fortney** (Vice President, Director, Biomedical Division, **EBSCO Information Services**) reviewed the biomedical information landscape, jokingly referring to the need for publisher / vendor representatives' histories / "genealogy charts." "Hot issues" of past conferences (Medical Library Association and others) may seem humorous now, but some themes still resonate. **L. Forney** prognostications — The patient? **Mike** at "WalSoftRx." The physical medical library of 2015? Food, "teaching center" spaces, etc. Journals? A series of articles published after peer review and copy editing. Clinical journals? More expensive, as personal subscriptions drop, with more hospital consortial packages. Databases? Integrated into clinical decision support systems and EMRs (electronic medical records).

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Discussions mentioned clinical information tool costs and librarians having to learn outcome and case-based budget request preparation, for a variety of scenarios and budget ranges.

Session — Thursday, November 3, 2005, Gold Ballroom, Francis Marion — *Online Reference Sources: Connecting The Dots Between Publishers, Technology and Libraries* — Presented by **Kathy Crowe** (Interim Associate Director, Jackson Library, UNC Greensboro), **Rolf Janke** (Vice President and Publisher, Sage Reference), **Bonnie Hawkwood** (eBook & Distributed Database Programs, Thomson Gale Corporation)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

Rolf Janke (Vice President and Publisher, Sage Reference) talked about content, the platform, and the customer. From the publisher's perspective, "p" and "e" should be the same, but "e" should take advantage of added value-links to related content, updates, etc. Content should be authoritative, comprehensive but usage data is difficult. The venture is not cheap, including platform development, royalties, image rights. "Shoulds:" more technology vendor partnerships, standards, building what's needed, working with libraries. **Bonnie Hawkwood** (eBook & Distributed Database Programs, Thomson Gale Corporation) discussed efficiency, connections between multiple publishers, relevance, recall, browseability, accessibility, development of "on demand" content translation, and "workflows" features: formatting, emailing, persistent URLs, sub-collection tools, etc. **Kathy Crowe** (Interim Associate Director, Jackson Library, UNC Greensboro) discussed advantages of online reference sources (24x7, high quality, usefulness for virtual reference), and issues/disadvantages (browsing and indexing differences, eBooks are not as popular as e-journals, though online reference works may be exception, lack of graphics in some cases). Pricing models abound. Duplication between "p" and "e" is a concern. There is a paradigm shift for staff. The challenge is to provide many access points. Also consider: curricula, user needs, information literacy. Session audience comments varied — "we need to normalize the cataloging," and "the print and online editions sometimes vary in content"...



Session — Thursday, November 3, 2005, Gold Ballroom, Francis Marion — *Don't Judge An eBook By Its Cover* — Presented by **David Bass** (Senior VP of Sales and Marketing, ebrary), **Alix Vance** (VP Business Development, North America, eBook Library), **Robin Fogel** (Strategic Content Manager, Medical Markets, Ovid Technologies), **Gillian Harrison** (Senior Manager of Library and Product Research, NetLibrary)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

David Bass (Senior VP of Sales and Marketing, ebrary) moderated and spoke on the panel that also included: **Alix Vance** (VP Business Development, North America, eBook Library); **Robin Fogel** (Strategic Content Manager, Medical Markets, Ovid Technologies) and **Gillian Harrison** (Senior Manager of Library and Product Research, NetLibrary). Each speaker emphasized his/her company's current focus and future plans, illuminating similarities and differences. For example, **eBrary** (<http://www.ebrary.com>) focuses on scholarly and STM titles from 220+ publishing partners, has flexible

pricing and multi-user access; **EBL** (<http://www.ebilib.com/>) puts forth as many titles as possible and allows flexibility through its short term rental, e-reserve, e-pack, deposit account and other options; **Books@Ovid** (<http://www.ovid.com/>) is an aggregated clinical science subscription model product, with engineering and chemistry packages (and possibly alternative models) coming soon; **NetLibrary** (<http://www.netlibrary.com/>) uses the 1 book/1 user model but is working on alternate models, has about 400 publisher partners, 100,000 titles. Per **David Bass**, "the value of digital is that it should be better than print." Presenters argued that aggregators provide the technology level and we (users? libraries?) have to pay premium for "e"... Questions and answers from the audience expressed issues of concerns to libraries: acquisition routes for eBooks; integration of business models; lack of prevailing formats; questions about the sustainability of the subscription model.

Session — Thursday, November 3, 2005, Laurens, Francis Marion — *Can Astronomy Serve As A Model To Solve The (Open) Access Problem?* — Presented by **Dr. Michael J. Kurtz** (Astronomer and Computer Scientist, Harvard-Smithsonian Center for Astrophysics)

Report by **Clara B. Potter** (Assistant Dean for Technical Services, Camden-Carroll Library, Morehead State University, Morehead KY 40351) <c.potter@morehead-st.edu>

Practicing astronomer **Dr. Michael J. Kurtz** presented a fascinating study of journal and e-print use in the field of astronomy. He first noted the size of the field of astronomy/astrophysics, the cost of the field, and the cost of the publication of a high-quality refereed paper, which came to about \$750,000. Astrophysics has a long-established e-print archive (**arXiv**), a metadata service called **Astrophysics Data System (ADS)**, and indexing service focusing on objects in space (**CDS**), and data centers which feed the system with data tables from various sources.

The cost of the publication has less to do with its readership than the utility of the publication. He notes most in his field use e-prints on **arXiv** until the journal comes out. They cite the journal article, not the **arXiv** article. But, journal use substantially increases if the article has been e-printed on **arXiv**. While there is a pre-print culture in Astronomy, the **arXiv** would not exist without the journals, and more to the point, it is not possible to write papers for the journals without being able to read them.

Kurtz states that in such a well-funded field as Astronomy, it is ludicrous to not spend money on journals, the cost of the journals being insignificant in the total cost of the field.

Session — Thursday, November 3, 2005, Carolina Ballroom, Francis Marion — *Bookstore Tourism: A New Twist on Literary Travel* — Presented by **Larry Portzline** (Writer/College Instructor, Bookstoretourism.com)

Report by **Heather Miller** (SUNY-Albany) <hmiller@uamail.albany.edu>

The conference got off to a rousing start with an entertaining talk by the originator of "bookstore tourism," a grassroots effort to support independent bookstores as well as tourist destinations. **Portzline** has conducted a number of such tours, mostly to Greenwich Village in New York, and has had enthusiastic participants. A bus takes people to the area where they are on their own to visit bookstores, with maps provided, reconvening for dinner and "show and tell." **Portzline** encourages others to follow suit and has written a book on the subject. Variations on the idea, which is suitable for Friends groups and de-

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velopment officers, are limited only by imagination. Some possibilities include libraries partnering with bookstores, hosting literary events, taking people to libraries (don't forget museum libraries) with a different event at each stop and visiting authors' homes. Benefits are numerous: promoting local bookstores, outreach, local economic development. The events are educational and enjoyable, and they unite people who share a love of books and the written word.

Session — Thursday, November 3, 2005, Carolina Ballroom, Francis Marion — *The Little Engine That Could: Google Chugs Into Libraryville* — Presented by **Mark Sandler** (Collection Development Officer, University of Michigan), **Mary Sauer** (Games- VP and Publisher, ProQuest), **Tom Turvey** (Strategic Development Partner, Google)

Report by **Heather Miller** (SUNY-Albany)
<hmiller@uamail.albany.edu>

Uniting **Google**, a publisher and a librarian on one podium, this panel attempted to sort out the pros and cons of each approach to information supply for the others. **Turvey** noted that **Google's** goal of creating a comprehensive electronic catalog is not intended as a substitute for books, libraries or librarians. Rather, it is intended to drive people to them. **Sauer** explained that the publisher's role in a **Google** world remains "to extend access to content," by adding value such as organization, editorial work, context, end user tools and librarian tools (e.g., branding, usage statistics). Publishers focus on how content will be used and enhancing that use. **Google** has raised the bar and publishers must innovate and listen to the user community. **Sandler** noted that "librarians feel left behind" in a swirling storm of electronic resources, projects, deals, etc. resulting in huge libraries forming in the ether. Declaring that "big libraries are better" because of their comprehensiveness and convenience, he said that libraries can compile communities of content for communities of users (selection), develop specialized tools for specialized users, selectively upgrade important texts, integrate various digital corpora, clear rights and archive. Collections are bigger than ever and our constituents are everywhere. Libraries can support each other in serving them.

Session — Thursday, November 3, 2005, Pinckney, Francis Marion — *Cooperative Monographic Collection Development, Pt. 2. The Colorado Not-bought Project: Coop. Coll. Development Without A Shared Approval Plan* — Presented by **Joan Lamborn** (Head of Administrative Services, Univ. of Northern Colorado), **Michael Levine-Clark** (Head of Collection Development, Univ. of Denver)

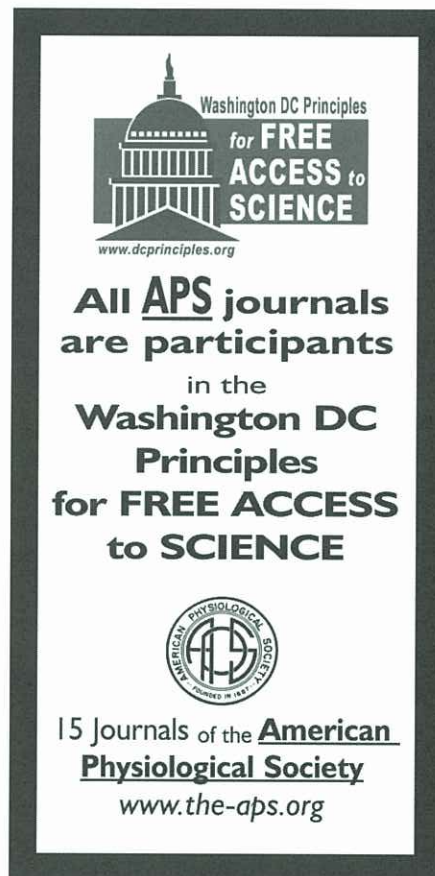
Report by **Heather Miller** (SUNY-Albany)
<hmiller@uamail.albany.edu>

Lamborn and **Levine-Clark** discussed use of the CARL union catalog as a way for selectors to coordinate purchases. The project began with a focus on STM monographs because purchasing them can get squeezed by heavy spending on serials, but was opened up to all selectors. Quarterly, a list of ISBNs is taken from the union catalog and compared with the **YBP** database of titles treated six months or more in the past. Titles not bought (*i.e.*, not in the union catalog but in the **YBP** database) are put in folders for selectors based on call number. Selectors review and order desired titles. From Nov. 2004 - June 2005 about 300 titles were purchased. The project has not impacted budgets or time significantly. It is often clear that titles were not purchased for a good reason. This project permits augmenting the collection and refining existing approval plans, while increasing comfort with cooperative purchasing. Next they plan to examine circulation figures for the 300 purchases and to expand the project by bringing in more libraries and vendors.

Lively Lunch — Thursday, November 3, 2005, Calhoun, Francis Marion — *Is Purchase on Demand A Worthy Model? Do Patrons Really Know What They Want?* — Presented by **Alberta D. Comer** (Associate Dean, Cunningham Memorial Library, Indiana State University), **Elizabeth A. Lorenzen** (Acquisitions/Serials Librarian, Cunningham Memorial Library, Indiana State University)

Report by **Kristen DeVoe** (Pittsburg, PA)
<kedevoe24@yahoo.com>

Alberta D. Comer and **Elizabeth A. Lorenzen** began their presentation with a discussion of what purchase on demand is and how other academic and public libraries are implementing purchase on demand, or patron driven selection. To test the theory that the library will become a more viable service for students if it collects the materials that patrons want, **Comer** and **Lorenzen** developed a two part test of patron driven collection at **Indiana State University**. Changing the bottom line of acquisitions from acquiring materials cheaper to acquiring materials faster, the **Cunningham Memorial Library** ordered ILL requests simultaneously through **Amazon.com** and ILL. The results? Purchasing books through **Amazon.com** proved to be a faster method of acquisition and **Amazon.com** was able to fill 35% of the requests that ILL could not. A second test using **Amazon.com**, **Gobi Rush**, and **Barnes and Noble.com** was done to compare the return rate of these online vendors. The purchase on demand program at **Indiana State University** also proved to be an evaluative tool that allowed library faculty to evaluate internal process, vendor performance, and approval plan performance. Patrons are satisfied with the program because it appeals to their demand for quick availability of materials, and they can see that their materials requests/suggestions are taken seriously and added to the collection.



Session — Thursday, November 3, 2005, Calhoun, Francis Marion — *A Publisher's Decision: What to Publish Online vs. Print* — Presented by **Jerry Cowhig** (Managing Director, Institute of Physics Publishing)

Report by **Kristen DeVoe** (Pittsburg, PA)
<kedevoe24@yahoo.com>

How do publishers make format decisions? **Jerry Cowhig's** pre-continued on page 58

sensation provided some answers to this question in a discussion of online vs. print publishing. The presentation began with a discussion on delivery methods for information, providing an overview of delivery methods for information throughout history from **Thomas Paine** to the 21st century. **Cowhig's** discussion then turned to focus on the steps involved in a print to electronic transition and of the changes made from a financial point of view. **Cowhig** explained that electronic only versions of journals become wholly new and different publications and are not merely online replications of their print counterparts. When making format decisions, publishers examine the steps that will be involved in a journal's format transition, discuss what the final outcome will be, and also assess the positive and negative aspects of each format. **Cowhig** explained that from a publisher's point of view, format (print or electronic) is only a distribution method, and the decision is ultimately the user's choice. Scientific associations and societies that publish their journals with **Institute of Physics Publishing (IOP)** have different format needs for their journals. The publisher takes into strong consideration the requests of the editorial board or editor in chief of the journal as well as the needs of the user community.

Session — Thursday, November 3, 2005, Colonial Ballroom, Embassy Suites — **Data, Data Everywhere: Making Sense of The Sea of User Data** — Presented by **Carol Tenopir** (Professor, School of Information Sciences, University of Tennessee), **David Nicholas** (Director of the School, Chair of Library and Information, City University, London), **Gayle Baker** (Professor and Electronic Services Coordinator, University of Tennessee Libraries), **Eleanor Read** (Social Science Data Services Librarian, University of Tennessee Libraries)

Report by **Rebecca Kemp** (Serials / Electronic Resources Librarian, University of North Carolina Wilmington)
<kempr@uncw.edu>

Carol Tenopir, Eleanor Read, Gayle Baker, and David Nicholas described the Maximizing Library Investments in Digital Collections Through Better Data Gathering and Analysis (MaxData) Project, an IMLS-funded program administered by partners at the **University of Tennessee**, the **University of Pittsburgh**, the consulting firm **Ciber**, and **City University**, London. The project uses surveys, library data reports, both vendor-generated and library-generated, and deep log analysis (raw hit counts to sites as counted by their logs) in order to identify how faculty and students are using electronic journals and databases. Survey responses will be compared with log numbers for the same institutions whenever possible to compare patterns. Deep log analysis can provide information such as whether users at the same IP addresses viewed multiple items or returned to the same pages after one viewing. The goal of the project is to help libraries develop best practices for gathering and interpreting different kinds of usage data.

Session — Thursday, November 3, 2005, Colonial Ballroom East, Embassy Suites — **Author Open Access Behavior and The Influence of Publisher Policies** — Presented by **Kristin Antelman** (Associate Director for Information Technology, NCSU Libraries)

Report by **Rebecca Kemp** (Serials / Electronic Resources Librarian, University of North Carolina Wilmington)
<kempr@uncw.edu>

Kristin Antelman studied two samples of Open Access articles: one sample of 2,000 articles in six social sciences, and one sample of six fields in the natural sciences and medicine. The journals in which these articles were published had different policies as to whether or not they

allowed author self-archiving of articles, whether preprints or postprints, and none allowed posting publisher PDFs. **Antelman** discovered, however, that authors do not necessarily consider themselves constrained by publisher restrictions, as there was no correlation between publisher policy and actual self-archiving practice. The disciplines varied in the type of document posted; authors in certain disciplines tended to post preprints, while authors in other disciplines mainly posted the publisher PDFs, in violation of the publisher policy. **Antelman** suggested that there is a disconnect for authors between copyright policy and their understanding of Open Access.

Session — Thursday, November 3, 2005, Carolina Ballroom, Francis Marion — **Forging The Library's Future In Our Electronic World** — Presented by **Jerry Klein** (CEO, Innovative Interfaces, Inc.)

Report by **Elizabeth R. Lorbeer** (Assistant Director of Collections Management, Rush University, Chicago, Illinois 60612) <elizabeth_r_lorbeer@rush.edu>

Jerry Klein, who is the CEO of **Innovative Interfaces, Inc. (III)** spoke on the integration of technology in library services. **Klein** warns that users may become confused with the branding of library supported resources with those freely available on the Internet. He acknowledged the uniqueness of academic book collections and promoted resource sharing to increase size. His discussion then focused on his experience with college campus tours and his perception of student guides promoting library services. **Klein** applauded the use of student guides; however, some audience members disagreed. Comments were made that students often lacked the knowledge to properly market the library.

Session — Thursday, November 3, 2005, Carolina Ballroom, Francis Marion — **What Will Become of Us? Looking Into The Crystal Ball of Acquisitions and Serials Work** — Presented by **Rick Anderson** (Director of Resource Acquisition, University of Nevada, Reno Libraries)

Report by **Elizabeth R. Lorbeer** (Assistant Director of Collections Management, Rush University, Chicago, Illinois 60612) <elizabeth_r_lorbeer@rush.edu>

It is not doom and gloom; rather how users interact with the physical library that is changing. **Rick Anderson** accurately describes what is happening in libraries today; information has become much more abundant and accessible on the Internet. Users no longer make trips to check out materials; instead usage increased for Internet resources. **Anderson** points out, are libraries purchasing the correct electronic materials for their users?

Lively Lunch — Thursday, November 3, 2005, Colonial Ballroom, Francis Marion — **Selling Books In A World of Technology: How Bookselling Has Changed Over The Past Twenty Years** — Presented by **Bob Schatz** (Director of US Sales, Coutts Library Services), **Karen Darling** (Head, Acquisitions Dept, University of Missouri, Columbia Libraries), **Nancy Gibbs** (Head, Acquisitions Department, Duke University Libraries), **Mark Kendall** (National Sales Director, YBP Library Services)

Report by **Sandra A. Beehler** (Acquisitions/Collection Development Librarian, Aubrey R. Watzek Library, Lewis & Clark College) <beehler@lclark.edu>

Two vendors and two librarians talked about the way selling books has changed in today's electronic environment.

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Bob Schatz has worked for both small and large book vendor companies. He sees a much bigger emphasis on infrastructure, functionality of vendor Websites and interoperability between vendor and library systems. He feels that "whiz-bang" plays a bigger role in selling books.

Mark Kendall outlined five key challenges to booksellers today:

- 1) the shift in emphasis to technological and automated aspects of vendor offerings,
- 2) the requirement for a higher level of technical expertise among booksellers,
- 3) the need to provide adequate training in technological innovations — he sees a trend towards a team approach to working with clients,
- 4) the increasing cost of doing business represented by higher investment in research and development,
- 5) a stronger bond between customers and vendors dictated by the need for interoperability of systems and the high cost of switching systems.

Karen Darling spoke about the shift of focus from the book itself to the processes by which it is selected and ordered. Traditional library staff divisions have blurred, with collection development staff tagging selections on vendor Websites or even keying orders into the ordering system, and acquisitions staff doing cataloging. The ILS makes the ordering and cataloging processes more transparent to other staff and library patrons. Libraries find it difficult to deal with vendors who don't provide up-to-date technology. Most librarians equate good customer service with good technology—electronic services for ordering & invoicing are all mandatory in RFPs these days. The reasons for using a vendor have less to do with coverage and more with added services. There seem to be more development partnerships between libraries and vendors.

Nancy Gibbs agreed that the challenges mentioned by **Mark Kendall** are mirrored in libraries. Library staff need increasingly higher levels of technical expertise, and often become experts/resources for other staff. She is seeing more partnerships with vendors on technological innovations. The time saved by automating interaction with domestic vendors frees up time to deal with foreign and small press vendors. She emphasized that customer service is still very important — and a voice on the phone necessary to solve some problems.

General comments: Automation doesn't free up time. Library selectors require more training as electronic notification slips and negotiating vendor Websites become part of the job. Selectors preoccupied with electronic resources have less time for title-by-title selection. Selectors put more demands on acquisitions departments because processes are more transparent. Credit card purchasing and online booksellers have changed the nature of library acquisitions. Publishing "seasons" seem less predictable. There is less demarcation between publisher & vendor. The vendor's customer-base is wider. Who in the library really decides on purchases is less obvious to booksellers.

Lively Lunch — Thursday, November 3, 2005,
Citadel Green Room, Embassy Suites — *The Same...But Different: Varying User Behavior in the Humanities and Social Sciences* — Presented by **Charles Watkinson** (Director of Publications, American School of Classical Studies at Athens), **Roger C. Schonfeld** (Coordinator of Research, Ithaka), **Karen A. Williams** (Associate University Librarian for Academic Programs, University of Minnesota), **Elliott Shore** (Chief Information Officer, Director of Libraries and Professor of History at Bryn Mawr College)

Report by **Myka Carroll Del Barrio** (Collection Development Associate, Publisher Relations, JSTOR) <mcd@jstor.org>

Moderator **Charles Watkinson** opened this full session by discussing the fragmented communications amongst humanities scholars and organizations, and he put forth the question of what could be changed in daily operational practices to better assess user behavior and encourage interdisciplinary interaction. **Roger C. Schonfeld** shared the results of a survey of 7,400 American professors that found a general trend towards greater use and reliance on electronic resources (with discipline-based differences). Compared to researchers in the hard and social sciences, however, humanities scholars have a lower tolerance for cancellations of print materials and a somewhat lower expectation of future dependence on e-resources. **Karen A. Williams** provided a preliminary look at the **University of Minnesota Libraries'** effort to understand discipline-specific research and general needs for humanities and social science researchers. The project team is assessing the role the libraries play as well as campus-wide, departmental, and personal resources to reconceptualize the campus as an information-rich environment where interdisciplinary collaboration is encouraged. Attendees were particularly impressed by the personalized "Undergraduate Virtual Library" portal that was one outcome of the study. **Elliott Shore** spoke of the notion of convergence, and he pointed out that the differences in research behavior within each discipline are just as important to consider. The Q&A included a discussion of how libraries should respond to humanities scholars' reluctance to use e-resources; the secretive and territorial mentality that humanities researchers still exhibit; and the need for libraries to broaden the pathways to information for researchers who find themselves lost outside of their comfort zone.

Lively Lunch — Thursday, November 3, 2005, Gold Ballroom,
Francis Marion — *The Best Dressed Book In Academe* —
Presented by **Mary "Tinker" Massey** (Serials Librarian,
Jack R. Hunt Library, Embry-Riddle Aeronautical University)

Report by **Lisa A. Hartman** (MLIS Student at University of
South Carolina School of Library and Information Science)
<lisa_a_hartman@yahoo.com>

When **Mary "Tinker" Massey** worked at the **University of South Carolina's Thomas Cooper Library**, her duties included moving new books from the browsing section to the stacks. This provided an opportunity to consider the value of keeping the jackets on the books and studying the effect that book jackets have on their circulation. **Ms. Massey** compared circulation statistics of new books that kept the jackets to those whose jackets were removed over time intervals, and noted that while the books without jackets increased in circulation by 14 percent, the books that retained their jackets increased in circulation by 54 percent.

This led to a discussion of the cost of keeping the jackets, the use of covers to protect the jacket, and the benefits of information on the jacket and whether that information could be moved directly to the book. Attendees agreed that there was the potential for various follow-up studies, including learning how circulation would be affected once most of the books in the collection had jackets. For more information on this study, **Ms. Massey's** article can be found in the March 2005 issue of "Associates" (<http://associates.ucr.edu>).

Table Talk — Friday, November 4, 2005, Embassy
Suites Atrium — *Making Sense of What You Find:
Online Reference and the Role of the Librarian* —
Presented by **John G. Dove** (CEO, Xrefer, Inc.)

Report by **Lisa A. Hartman** (MLIS Student at University of
South Carolina School of Library and Information Science)
<lisa_a_hartman@yahoo.com>

John G. Dove led a discussion on the services of his company,
Xrefer, Inc. and what is needed to help researchers of all ages sort

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through the large amounts of information available. The focus of the discussion was on ways that libraries and academic institutions can cultivate students' interest in the subjects that they are researching. One method that **Mr. Dove** suggested was games, which generated information on the searched subject, along with relationships with other subject areas that may previously have been unknown. Since many reference services offered today are online, the group discussed methods of feedback so that librarians would know that the services were useful to the students and patrons. These methods included "ask a librarian" functions, and "was this entry useful?" buttons. Preferably librarians would receive immediate feedback, so that they could check to see if the patron needed assistance. Finally, the group discussed the benefits of pathfinders in helping researchers wade through information and the variety of resources available.

Lively Lunch — Friday, November 4, 2005, Laurens Room,
Francis Marion — *Creating Leaders: The Impact of
Leadership Training Programs on the Subsequent
Leadership Behavior of Librarians* — Presented by
Daniel Phelan (Manager, Collections Services Team,
Ryerson University, Library)

Report by **Lisa A. Hartman** (MLIS Student at University of
South Carolina School of Library and Information Science)
<lisa_a_hartman@yahoo.com>

Daniel Phelan presented the results of his research on participation of new librarians in leadership institutes. He surveyed librarians who participated in the **Northern Exposure to Leadership Institute (NELI)** to learn their reactions to the Institute and whether they were influenced by the workshop in taking leadership roles in their current positions. **NELI**, and other similar institutes, are often secretive, and participants are recent graduates from library school (within seven years), and nominated to attend the Institute. There was a wide range of responses to questions such as whether the respondents felt **NELI** was crucial to their success. Some felt that it had little effect on their success; others felt that their success was influenced by other factors such as supervisors and geographic location. Participants noted three particular benefits of **NELI** attendance. They received encouragement from each other, gained mentors, and made networking connections.

When the floor was opened for questions, workshop attendees were interested in learning more about the nomination process for the Institute. Some discussion was held as well of the cost of attending the Institute. Preferably, the employer would cover these costs.

Lively Lunch — Friday, November 4, 2005, Gold
Ballroom, Francis Marion — *Gifts-In-Kind: Making
Them Work For You!* — Presented by **Linda Slocum**,
Moderator (Gifts Collection Coordinator, Oberlin College),
Jack Montgomery (Coordinator of Collection Services,
Western Kentucky University), **Dustin Holland**
(Director, Better World Books), **Patrick Kindregan**
(Associate Director, Better World Books)

Report by **Kirstin Steele** (Collection Management Librarian,
The Citadel Military College, Charleston SC)

SYNOPSIS: **Linda** gave an overview of how **Oberlin** does gifts: **FileMaker Pro**, separate shelves, and a paper card file used when donors check up on gifts. She mentioned the "Gifts Express" program at **Harvard**, wherein gifts can be borrowed prior to cataloging.

Jack described making gifts "work;" he earned credit with book and serials vendors by sending surplus gifts to be sold. Ask: what we

hope to accomplish; if it will benefit institution, how; is it legal; how will you budget staff time required; do you have administration's support; how and when to measure success? Call it an "experiment." Tip: don't sell books that donors gift-plate themselves!

Dustin and **Patrick** described **Better World Books** as a "social venture" business, with \$400,000 donated to literacy causes (NOT including what libraries receive) and 2.6 million books diverted from landfills. 250 libraries participate, and a few charitable thrift stores; participants can check sales online. **BWB** sells 5,000-15,000 books and AVs per day on 14 sites, with 30-35% of sales going overseas.

SESSION SUMMARY: Audience of 30 was attentive and asked many procedural questions of **Dustin** and **Patrick**.

Issues raised by speakers or audience: gift plates as privacy issue; how does a withdrawn book differ from a rejected gift, as "surplus?" Surprise sellers: old textbooks, poetry. Credits with vendors vs. cash payments to institutions. The "social venture" nature as well as being good PR for donors — successful participants can add to donor forms the point of benefiting literacy groups, not just "selling" or "recycling" rejected gifts.

POSSIBLE FUTURE PROGRAMS: **BWB** working with attorneys general in several states to look at laws to benefit all parties: case studies of individual libraries, successes and not.

Circulating without processing; e.g., the **Harvard** program **Linda** mentioned, and also the "purchase on demand" books at **Indiana State University's** library. Am sure there are other examples... are catalogers writhing in agony? Are patrons keeping things?

"Nothing free about a gift"!

Table Talk — Friday, November 4, 2005, Embassy
Suites Atrium — *Customizing Faculty's Needs:
Development of A Liaison Program (A Subject
Librarian's Priority)* — Presented by **Gayle Chan**
(Collection Development Librarian, University of
Hong Kong Libraries)

Report by **Sandra A. Beehler** (Acquisitions/Collection
Development Librarian, Aubrey R. Watzek Library,
Lewis & Clark College) <beehler@lclark.edu>

Gayle Chan described the development of a liaison program at the **University of Hong Kong Libraries**. To serve ten faculties with 19,000 students, **HKU** libraries has one main and five branch libraries. The branch librarians have always had a strong relationship with their faculty, but faculties without branch libraries had little interaction with the library. In 2002, the main library began to develop a liaison system to these faculties: Architecture, Arts, Humanities, Social Sciences, and Science & Engineering.

The reasons for this change in collection development structure were many: to build a stronger relationship with customers (faculties); to shift selection responsibilities from faculties to the library; to offer more personalized services. The CD team as restructured includes several members dedicated to collection development as well as "virtual" members who have responsibilities in other library teams (e.g., reference). Librarians assigned to the CD team are responsible for building relationships with faculties and becoming active partners in the educational process.

The first steps taken were to identify roles to be played by the CD team members and to provide training to develop the skills and knowledge needed. Goals of the liaison program were identified: to improve communication and collaboration with faculty, to ensure that the library is meeting users' needs by connecting them to appropriate resources, and to increase library visibility. The team then developed a survey targeted to professors in each faculty in order to determine what services were viewed as most important. The results differed by faculty, but overall collection building was ranked as highest priority, followed by research consultation, integrating library materials in teaching, promoting library resources, instruction on subject

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research, and fostering closer collaboration with faculty (respondents felt the last service should be automatic given the other services).

Survey results enable the team to formulate a customized service plan for each faculty based on findings. One of the innovations was a blog (lib.hku.hk/roller/page/cder/) about new resources in the library, which can be accessed by professors as desired. Benefits of the new plan included a greater emphasis on liaison with library users, focused development of digital resources, more integration of resources into the educational/teaching process and better promotion of the library collection and services.

Session — Friday, November 4, 2005, Colonial Ballroom, Francis Marion — *Hard Core Collection Made Easier: Hear How Three Industry Leaders Are Partnering To Make Your Selection Activity A Breeze* — Presented by **Irving Rockwood** (Editor & Publisher, CHOICE), **Deborah Loeding** (VP, Sales & Marketing, The H.W. Wilson Company), **Angela D'Agostino** (VP, Business Development & Marketing, Bowker)

Report by **Sandra A. Beehler** (Acquisitions/Collection Development Librarian, Aubrey R. Watzek Library, Lewis & Clark College) <beehler@lclark.edu>

The three presenters talked about their collaboration on a new product due out in 2006: *Resources for College Libraries (RCL)*. Currently, librarians looking to build new collections or assess existing collections may consult *Books for College Libraries* (3d ed., 1988), CHOICE outstanding titles and Wilson standard catalogs. The new product brings together these resources with the addition of some of Bowker's resources.

Angela D'Agostino mentioned suggestions from customers that will be incorporated: more descriptive information, information on availability, ability to download, manipulate, share & print data, inclusion of reviews, regular updating, ability to compare a library collection to core lists, inclusion of 'hot topic' subjects. Ideally, customers could use the RCL to identify gap titles, read reviews of them and locate available stock.

Deborah Loeding reviewed a list of customer uses for selection tools: for informed purchasing decisions, for verifying bibliographic data, for readers' advisory purposes, for "challenged books" support, for curriculum support and for guidance in weeding. She described the process for selecting titles for the core lists and for linking titles to reviews and other helpful information.

Irving Rockwood introduced the RCL, to be published in late 2006 in both print and Web-based versions. He gave a brief history of its predecessors: BCL1, 2 & 3. The RCL's initial target is 50,000 titles, including the best of BCL3. The target level is still an undergraduate population. Interdisciplinary subject areas will be added to the previous subject divisions. CHOICE will provide editorial management, Bowker & H.W. Wilson contribute marketing expertise and technological assistance. The business plan allows for regular updating and expansion, and the editorial side of the operation will be upgraded to allow Web-based editing and honoraria for editors. Bowker and Wilson products may be linked to the RCL.

Session — Friday, November 4, 2005, Carolina Ballroom, Francis Marion — *Measuring Success and Comparing Ourselves In An Internet Age* — Presented by **Stephen Abram** (Vice President of Innovation for SirsiDynix), **Bob Molyneux** (Chief Statistician, SirsiDynix)

Report by **Rebecca Kemp** (Serials / Electronic Resources Librarian, University of North Carolina Wilmington) <kempr@uncw.edu>

Stephen Abram and **Bob Molyneux** of SirsiDynix presented the SirsiDynix Personas project, which is designed to provide librarians with narrative accounts of how patrons actually use the library. **Stephen Abram** described the power of narratives to communicate effectively the needs and values of the people who provide them, which led SirsiDynix to administer interviews to many library patrons for the Personas project. **Bob Molyneux** then discussed the Normative Data Project, a collection of circulation transactions from hundreds of public libraries throughout the United States and Canada. It can provide libraries information about which materials are circulating heavily and which are not, which institutions specialize in particular subject areas, and a wide range of other useful data.

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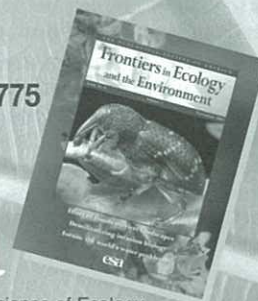
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Session — Friday, November 4, 2005, Citadel Green Room South, Embassy Suites — *The Institution Registry: An Idea Whose Time Has Come* — Presented by

Audrey D. Melkin (Director of Business Development, Atypon), **Amy Brand** (Director of Business Development, CrossRef), **Gregory F. Malar** (Circulation Director, Rockefeller University Press), **Adam Chandler** (Information Technology Librarian, Cornell University Library)

Report by **Rebecca Kemp** (Serials / Electronic Resources Librarian, University of North Carolina Wilmington) <kempr@uncw.edu>

Audrey Melkin, Amy Brand, Gregory Malar, and Adam Chandler outlined the **Atypon Institution Registry**, a central database for storing information such as institution name, address, library contact information, and IP addresses, for easier interactions between publishers and libraries. **Melkin** described a system in which institutions would have digital object identifiers (DOIs) as unique identifiers. Voluntary participation in the registry would create much more efficient data interchange. **Brand** indicated that widespread use of the registry would be necessary. **Malar** indicated difficulties in the current system of information interchange. He also noted emerging standards, such as **ONIX** for serials, and the **Ringgold Consulting Firm's** initiative to create a library identity database (the topic of another conference program). Finally, **Chandler** cautioned that **Atypon** might be trying to incorporate too much information into the registry. During the question and answer session, people expressed concern that **Atypon** would be branding this free resource, and that the administration of the database perhaps would become too burdensome for **Atypon** as time goes on. The registry is still under development.

Session — Friday, November 4, 2005, Citadel Green Room South, Embassy Suites — *Revisiting Price Indexes for Library Materials* — Presented by **Fred Lynden** (Scholarly Resources Department, Brown University Library)

Report by **Michael N. Kaltwang** (MLIS Student, University of South Carolina) <MKaltwang@netc.edu>

This session discussed the issues faced when using price indexes to justify budgets and budget increases. Some of the points discussed in detail include: (1) local price studies, (2) historical price data, (3) data on foreign exchange rates, and (4) national price indexes. Since it is so difficult to use national/international price data due to the different formats and negotiation possibilities for journals today, it is now the 'norm' to use local price studies to justify budgets and increases. Libraries can now track local trends using national pricing standards.

Historically, the national price index (NPI) was developed to provide meaningful data for budget justifications, but as consortia deals developed, foreign exchange rates rose and the electronic revolution came about, the data in these NPI's became less relevant to many libraries. These factors and others drove the need for local price data studies. With today's technology, vendors can supply the data you need and the information can also be gathered

online. Although there are still published indexes for periodicals, they have lost their accuracy and usefulness.

Table Talk — Friday, November 4, 2005, Embassy Suites Atrium — *The Important Three C's of Library/Vendor Relations: Communication, Collaboration, Competency* — Presented by **Eve Davis** (Senior Account Services Manager, EBSCO), **Lisa German** (Asst. Dean for Technical and Collection Services, Penn State University)

Report by **Michael N. Kaltwang** (MLIS Student, University of South Carolina) <MKaltwang@netc.edu>

This session discussed the history and current status of a library/vendor relationship that occurred between the **University of Illinois at Urbana-Champaign (UIUC)** and serials vendor **EBSCO**. **UIUC** was dealing with **EBSCO** for about 9,000 line items, had approximately 86 separate accounts, and had several different ship points (for multiple libraries). The process of working with 86 separate accounts became too much for both the vendor and the library. Through the use of good communication, collaboration, and competency, the vendor and library came to several agreements resulting in only one account to manage and process. This change saved time and administrative expenses for both the vendor and the library.

As was mentioned in the presentation, some of the attributes associated with good communication, collaboration, and competency between libraries/vendors are as follows: good communication between library staff, between library and vendor, between vendor and library staff, and between the vendor representative and their company. Some of the principles of collaboration include seeking different viewpoints, working together, and to involve the people who are most affected. As for competency, it is expected from both parties. There has to be an established basis of trust.

Session — Friday, November 4, 2005, Routledge, Francis Marion — *Pricing Models: What Works and What Doesn't* — Presented by **David Hoole** (Head of Brand Marketing and Content Licensing, Nature Publishing Group)

Report by **Michael N. Kaltwang** (MLIS Student, University of South Carolina) <MKaltwang@netc.edu>

This session discussed pricing issues and other issues related to the **Nature Publishing Group (NPG)**. **NPG** publishes a range of journals and science magazines. The presentation started with an overview of **NPG** discussing how it was formed as a division of **Macmillan Publishing Limited**. *Nature Magazine* was the flagship journal. From 1869-1980's, there was a lot of advertising and high circulation. In the late 1990's, **NPG** experienced a period of rapid change, including the introduction of a Website. Since 2000, **NPG** has experienced more growth, has made the Website more stable and now receives 30 million page hits per month.

With regard to pricing models, **NPG** had to change with the times. In 1998, **NPG** began issuing site licenses with 500 selected sites, allowing five simultaneous users. In 2000, after realizing that the current site license was not sufficient, they introduced site licenses based on IP addresses. Recent developments and challenges like the economic slow down following 09/11 has also made it necessary to adjust prices. **NPG** vows to make sure prices are simple, clear, and as fair as possible.

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Session — Friday, November 4, 2005, Colonial Ballroom East, Embassy Suites — *Developing a Predictive Model of Library Collection Use* — Presented by **Bob Molyneux** (Chief Statistician, SirsiDynix)

Report by **Kristen DeVoe** (Pittsburg, PA)
<kedevoe24@yahoo.com>

Bob Molyneux began this presentation with a discussion of the existing literature on use studies in libraries. The literature review included a summary of the results of use studies dating back to the 1930s, an analysis of methods used in these studies, and a discussion of how these use studies may predict future library use. After the literature review the presentation turned to the work of the **Normative Data Project (NDP)**. The **Normative Data Project** is designed to measure aspects of the use of public libraries in the US and Canada. Library data is linked with demographic, geographic and other data to develop a predictive model of collection use that help library decision makers better understand their collection's use and make better collection development decisions. The model can also help libraries know in which branches certain collections should be located to best serve library patrons. **Molyneux** identified sources of the library, demographic, and geographic data as well as the problems encountered thus far in the project. More information on the **Normative Data Project** can be found on the project Website, <http://www.libraryndp.info>.

Session — Friday, November 4, 2005, Carolina Ballroom, Francis Marion — *Book To The Future? 21st Century Models For The Scholarly Monograph* — Presented by **Colin Steele** (Emeritus Fellow, Australian National University)

Report by **Heather Miller** (SUNY-Albany)
<hmiller@uamail.albany.edu>

Noting that the scholarly monograph has declined since 1960, **Steele** looked at ways that scholarly publishing may remain viable in the digital era that is creating changes comparable to those of the 15th century, among them the need for new business models for the scholarly monograph. Publicly funded research should be publicly available, the current system of scholarly publishing is not always in the best interest of the research community and reward systems need to change, he said. Open access (OA) e-presses, like institutional repositories, should be seen as part of a university's public good output at relatively little cost. Theses and dissertations are increasingly freely available on the Web. He noted that the **University of California's eScholarship Repository** is one of the most successful system wide programs ever at UC. At the **Australian National University**, the E Press will be built on a set of centralized digital publication services. "Convenience is king" and as the scholarly monograph continues to be transformed by numerous electronic initiatives, university presses, libraries and universities themselves will find opportunities for new relationships and the development of new communication structures.

Session — Friday, November 4, 2005, Carolina Ballroom, Francis Marion — *Google Scholar, Et Al: Compete or Cooperate? What Goes Into The Decisions of Information Companies With Respect to Free Web Services* — Presented by **Angela D'Agostino** (Vice President, Business Development & Marketing, Bowker), **Matt Dunie** (President, CSA (Cambridge Scientific Abstracts)), **Suzanne Bedell** (Vice President and Publisher, Proquest), **Tom Turvey** (Strategic Development Partner, Google)

Report by **Heather Miller** (SUNY-Albany)
<hmiller@uamail.albany.edu>

According to **Turvey**, **Google Scholar** drives traffic to publisher Websites and libraries. Some libraries put a link to **Google Scholar** on their Websites, using it as a metasearch engine. **D'Agostino** explained that publishers face a dilemma if their content is indexed publicly — lack of branding, loss of control over the user's experience, copyright issues and questions as to whether this exposure will increase or decrease sales. When **Bowker** experienced falling sales of *Books in Print* after the advent of **Amazon.com**, they developed an online strategy for controlling the user's experience, creating **booksinprint.com** and focusing on adding value and functionality for users with complex needs. **Dunie** noted that inclusion in **Google** increases visibility, but not necessarily sales. There are costs (content management, staff time, sales, customer loyalty) for unclear benefits (greater value, visibility, maybe revenue). **BeDell** noted that some libraries use a federated search to counterbalance **Google**. Abstracts and indexing plus 20 pages of text are available on **Google Scholar** for **ProQuest** theses and dissertations. The nature of publishing is clearly changing and the benefits of **Google Scholar** for publishers remain unclear.

Session — Friday, November 4, 2005, Carolina Ballroom, Francis Marion — *The Confluence of Open Access and Licensed Content* — Presented by **Greg Tananbaum** (President, The Berkeley Electronic Press), **Mary Newhart** (Web and Digital Projects Manager, Catherwood Library, School of Industrial and Labor Relations, Cornell University), **Polly Siobhan Karpowicz** (Director, Web and Publications, American Political Science Assoc.), **Stephen Rhind-Tutt** (President, Institution/Organization: Alexander Street Press, LLC), **Edward N. Zalta** (Senior Research Scholar, Stanford University)

Report by **Heather Miller** (SUNY-Albany)
<hmiller@uamail.albany.edu>

This session made it clear that the line between licensed content and open access (OA) is blurring. **Karpowicz** noted that the **APSA** is respectful of OA, but cautious. Three journals are a benefit of membership, but the organization provides some free materials on its Website as well as **PROL**, an OA preprint server for all emerging research in political science, promoting discipline wide collaboration. Start up funds for **PROL** came from a **Mellon** grant while ongoing revenue comes from partner contributions and **APSA** subsidy. Technical, usage and legal issues are ongoing.

The Stanford Encyclopedia of Philosophy is a customized Web content management system built with grant funds. The goal is to raise \$3 million and live off the income. This model was chosen because the traditional subscription model was too costly and **Zalta** thinks others can also use this model for funding OA publications. Unfortunately, foundations are suspicious of the endowment model of publication and some librarians want to be free riders.

The *Industrial and Labor Relations Review* is housed on the **Cornell** institutional repository (IR) because it is part of the intellectual output of the school. Affordability was a major point of pride. The most recent five issues are available only to subscribers, making this a hybrid model requiring dual systems and extra training for staff, according to **Newhart**.

Rhind-Tutt explained the fears of publishers that authors will put everything on the IR, peer review and quality will be lost, and publishers cease to exist, but went on to say that free and fee are not opposites. He is convinced that content will be ignored if it is not available via the free Web. He pointed to two resources that blend free and fee. *Women and Social Movements* has a free version and a separate fee version that is greatly enhanced. Without fees, the resource would stagnate. *In the First Person*, an index to first person narratives, is freely available on the Web. Once at the publisher's Website, one can choose free access to public materials or entry into fee based products.

Tananbaum noted that formerly mutually exclusive ideas are merging.

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Session — Friday, November 4, 2005, Pinckney, Francis Marion — *Cooperative Monographic Collection Development, Pt. 3. Developing A Shared Approval Plan: The Tri-Colleges Experience* — Presented by **Megan Adams** (Social Sciences Librarian, Swarthmore College Library), **Robert Kieft** (Librarian of the College and Director of College Information Resources, Haverford College Libraries), **Amy McColl** (Assistant Head of Technical Services, Swarthmore College Library)

Report by **Heather Miller** (SUNY-Albany)
<hmiller@uamail.albany.edu>

Shared approval plans are often elusive goals, but the **Swarthmore**, **Haverford** and **Bryn Mawr** libraries have made a good start in that direction, judging by this pilot project. Goals included making informed decisions about monographs cooperatively, avoiding unnecessary duplication but allowing for intentional duplication, saving money, saving time for other activities and operating virtually. **YPB's GOBI** was chosen to facilitate the latter goal. Two plans were established, one for literature and film, based on publisher, and one for political science, based on LC subject class. Slips are provided online weekly. If the profile provides a title as a book to one of the libraries, it will be kept. The other two libraries thus have a basis for deciding whether to purchase it themselves. Bibliographers add notes to the records in **GOBI** and orders are placed (or not) based on these notes. Duplication has decreased, but it is not yet clear whether this will result in more unique titles being added to the collections as a whole. They plan to study circulation records for the titles obtained this way, develop a joint collection development policy and expand the program to other subjects.

Session — Friday, November 4, 2005, Gold Ballroom, Francis Marion — *eJournal Interface Can Influence Usage Statistics: Implications for Publishers, Libraries, and Project COUNTER* — Presented by **Phil Davis** (Life Sciences Librarian, Cornell University)

Report by **Karen Fischer** (University of Iowa) <karen-fischer@uiowa.edu>

Usage statistics are good for consistency, credibility and comparability. **Davis** tested the assumption that **COUNTER** compliant data allows for comparison between publishers and found that this was not true. He attributes this to interface differences between publishers.

Using 2004 usage data from **Cornell**, **Davis** found that the ratio between html and pdf downloads was not constant across all journals and publishers, but that there is a high internal consistency within publishers. An examination of usage for the *EMBO Journal* provides a unique opportunity to examine interface effect because it is published on **Nature** and **Highwire** platforms. **Davis** found that there was a much higher pdf to html ratio on the **Nature** platform indicating that the publisher interface can have a huge effect on the usage of a journal. The **Nature** interface allows for a direct link to the pdf document from the abstract, while the **Highwire** interface one has to click on the html version before getting to the option to select pdf (this has since been changed by **Highwire**, and **Davis** plans to look at 2005 usage to see if it changes the ratio).

Three solutions to the "interface effect" were suggested by the presenter: standardize user interfaces (which is not desirable for publishers), create "adjustment factors" when comparing usage statistics, and/or improve upon **COUNTER** standards so that statistics can be comparable between publishers. **Davis** concluded by advising that cross-publisher comparisons of usage statistics should not be made at this time.

The final manuscript by **Phil Davis** and **Jason Price** (co-author) can be viewed at this URL (<http://people.cornell.edu/pages/pmd8/interface.pdf>). It is to be published in **JASIST** in 2006.

Session — Friday, November 4, 2005, Rutledge, Francis Marion — *Collaborative Role of Library Acquisitions in Development and Testing of Vendor Systems* — Presented by **Sha Li Zhang** (Assistant Director for Technical Services and Interim Assistant Director for Collection Management, UNC Greensboro), **Glen Worley** (Manager, Monograph Acquisitions and Approval plans, University of Texas Libraries), **John Henry Williams** (Public Service Administrator and Manager of Acquisitions, Wichita State University Libraries), **Dan Miller** (Electronic Services Consultant, Blackwell's Book Services)

Report by **Katherine L. Latal** (Head, Acquisitions Services Department, University at Albany, University Libraries, LIB 34)
<KLatal@uamail.albany.edu>

All four presenters gave detailed accounts of their experience beta testing **Blackwell's Book Services'** new order management and distribution system, **CMS**, that was launched in the fall of 2004. Ten libraries had the opportunity to evaluate each feature of the system to determine if it was a necessity or simply interesting or desirable. A variety of libraries were asked to participate to get a cross section of customers.

The presenters touched on several things a library should consider when testing a vendor's product.

A library should negotiate a contract with the vendor on the particulars of the test, to protect the library and manage the time devoted to the project. A beta test gives a library the chance to provide informed input and influence the end product. Testing takes staff time away from other library work.

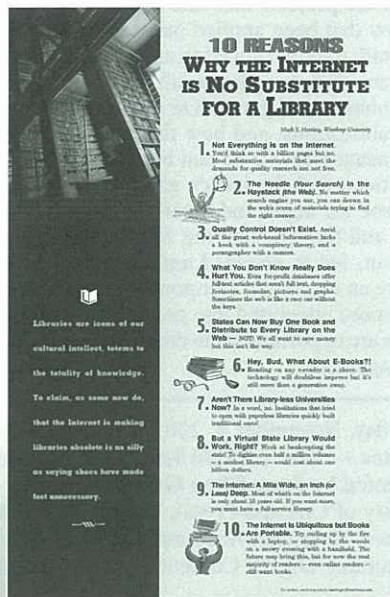
A library will benefit from evaluating and shaping the final product and will also improve their relationship with the vendor. Since each library's needs are different, each library will use the system in a different way. The vendor benefits from receiving diverse feedback prior to going live, when modifications are still possible, creating a smoother transition to the new system.

Session — Friday, November 4, 2005, Colonial Ballroom, Francis Marion — *COUNTER at 3 and the Result of the JISC Project: An Application of COUNTER* — Presented by **Peter Shepherd** (Director, Project COUNTER), **Hazel Woodward** (Cransfield University)

Report by **Adrienne N. Fallaw** (University of South Carolina, School of Library & Information Science)
<adriennefallaw@yahoo.com>

The speakers co-presented a summary of the challenges **Project COUNTER** has faced to see where they are today, followed by a **JISC** survey of statistics. **Mr. Shepherd** began the first part of the session by discussing several codes of practices that have been published and will be published. Future trends include a move towards e-resource codes of practices. Member categories, annual fees, and benefits were discussed. **Ms. Woodward** presented the second part of the session briefly describing a statistical analysis of academic library journal usage in the United Kingdom. The **JISC** project was awarded to a consortium, of which **Cransfield University** is a member. **Ms. Woodward** outlined discoveries from the project, including an increase in the number of downloads of full-text articles. The study revealed a direct correlation between use and price: high use titles were those in the high range, while low use was associated with low price. Overall, the study showed that only a small percentage of titles accounted for high use. The session concluded with a ten minute question and answer session. More information about **Project COUNTER** can be found at <http://www.projectcounter.org>.

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How to Order the “10 Reasons” Poster

“10 Reasons Why the Internet is No Substitute for a Library” (*American Libraries*, April, 2001) has been turned into a 4-color, 22" x 36" poster (ALA “READ” size poster) and is available for \$10 each (this **includes** shipping and handling). Bulk orders are available on request and begin at 16 or more orders for \$8 each. (South Carolina residents, add applicable sales tax.)

If interested, please respond to <herringm@winthrop.edu>. Check or money order is acceptable and should be made out to “Winthrop

University.” (You may also send a purchase order, or we will bill you.) They should be mailed to Winthrop University, Dacus Library, Attn: MY Herring, Rock Hill, SC, 29733.

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Lively Lunch — Friday, November 4, 2005, Pinckney,
Francis Marion — **Account Management Websites:
Streamlining the Administration of Subscriptions** — Presented
by **Adam Chesler** (Assistant Director for Sales and Library
Relations, American Chemical Society), **Jill Emery** (Director,
Electronic Resources Program, University of Houston Libraries)

Report by **Martha G. Scott** (Student, University of South
Carolina) <mg7scott@yahoo.com>

The room was filled with publishers, librarians, and subscription agents. The moderators opened the floor to discussion after a short description of the jobs of those people in the room. **Chesler**, the moderator, asked for proposed changes in the Web-based account management sites and a lively discussion ensued. With a marker in hand he listed approximately twenty statements the librarians wanted to see on the publisher's interface; these spirited suggestions created many interesting discussions among the librarians, publishers and agents and the vitality in the room was exciting. The next statement he asked was what the librarians did not want to see on the interface; this list was not as long, but the lively discussion did not lose any momentum. It was finally stated that format is as important as content, and the invigorated crowd reluctantly went to the next session. It will be interesting to see what changes ultimately will be made.



Session — Friday, November 4, 2005, Calhoun,
Francis Marion — **Developments in Open Access: Authors,
Librarians and Users** — Presented by **Ian Rowlands**
(Department of Information Science, Director of CIBER,
City University London), **Dave Nicholas** (Director of the
School, Chair of Library and Information Studies and
Director of CIBER, University College London)

Report by **Martha G. Scott** (Student, University of South
Carolina) <mg7scott@yahoo.com>

The moderators divided the session beginning with the background and purpose of the 2005 survey of journal author's opinions on open access publishing. Being the biggest survey of its kind, 5,513 online interviews were conducted asking authors where they wanted to publish. It was found they were definitely brand driven, always looking at the readership of the journal, placing a high value on peer review and impact factor; basically their careers were dependent on where they publish. On the current system, it was interesting to note that they felt information overload was someone else's problem, they felt a big disconnect with the authors, libraries, and publishers, and that everyone else's journal was too specialized. When asked about open access, they wanted to know who would pay to fund the project. The *Nucleic Journal* was used as an example, which went open access in 2004, and because of its prestige, authors wanted to pay to publish there. This session was scheduled last on the second day and this would have been better served to have been scheduled earlier in the day; information overload occurs at that late time. Gratefully the moderators posted this address: http://www.slais.ucl.ac.uk/papers/dni_20050925.pdf.

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Lively Lunch — Friday, November 4, 2005, Colonial Ballroom, Francis Marion — *How to be a Scam-buster: What do when Frauds and Crooks call your Library* —

Presented by **Rick Anderson** (Director of Resource Acquisition, University of Nevada, Reno)

Report by **L. K. Gypsey Legge** (MLIS Candidate, University of South Carolina) <gypsey@mac.com>

Rick Anderson presented an informational and lighthearted primer on some common sense points to recognizing and avoiding common scams perpetrated on libraries, along with several illustrations from his own experiences. After an unusually complex and fractious exchange, **Mr. Anderson** elected to bring the situation to the attention of several email lists to which he subscribes, and to later make a call to a reporter from the *Chronicle of Higher Education*. **Scott Carlson** followed up with an article in the *February 25th Chronicle*,¹ but the attempts to defraud libraries are ongoing.

Some of the most salient points from the talk were:

- Put the word out! Alert all library staff, including student workers in an academic setting, to scam techniques, especially those who work outside the acquisitions or business office areas, trying to bully those who are less mylar with their tactics.
- Put the word out! Tell colleagues at other institutions. If you are reasonably sure that a scammer has called or put out a false invoice, let others know what techniques were used. Encourage them to put the word out!

Points from the audience included:

- If you pick up the phone and the person on the other end begins with "Hi! How are you today?" answer "Who is this?" Scammers frequently record conversations, and a "Fine, how are you?" answer may be edited to sound like a verbal agreement.
- This is not limited to academic libraries. Audience members represented a broad spectrum, including public, academic and military libraries, and had heard of such approaches in many other libraries.

Scammers may attempt to force payment for inclusion in a directory, for unrequested materials, or may even try to claim payment for renewal of a subscription that is purchased from another vendor. Scammers may never go away, but through vigilance and coordinated efforts, we can reduce the negative impact they are having on libraries.

Endnote: 1. Carlson, Scott. "College Libraries Are New Targets of Telemarketing Scams," *The Chronicle of Higher Education*, 51:25, February 25, 2005. Page 34.

Table Talk — Friday, November 4, 2005, Embassy Suites Atrium — *Challenges and Opportunities in the Realm of Metadata* — Presented by **Jin Ma** (Electronic Resources Cataloging Librarian, Pennsylvania State University)

Report by **L. K. Gypsey Legge** (MLIS Candidate, University of South Carolina) <gypsey@mac.com>

A new format for presentation and discussion, **Table Talks** were a rousing success. Originally prepared for 10 or 12 people, this table had 20 plus people, seated and standing three deep in spots. Facilitator **Jin Ma** introduced the topic by having each attendee give a brief introduction, and describe their interest in the discussion. These ranged from administrators seeking a current best practices understanding, to a products and services company representative seeking

potential value added services, to those who were looking to create an Institutional Repository in the near future, as well as many others.

Handouts described the projects that **Ms. Ma** has been involved with, and the work flow that been applied on projects she has been involved with, but the talk rapidly flowed from basic questions, such as the basic and recurrent "What is Metadata?" into highly technical areas such as how to enhance and generalize metadata for "laminating" onto electronic publications, and how the Open Access Initiative/Protocols for Metadata Harvesting can best be accommodated. Starting with introductions and the basics gave all the participant/attendees a chance to see the depth and breath of those who are engaged with this topic, and the free flowing format, with the shared reference to the handout, led to engaged and engaging discussion. As more resources have an electronic component or are born digital, metadata will become more integrated into processing workflow and discussions such as this are opportunities to create shared understanding at all levels of engagement.

Lively Lunch — Friday, November 4, 2005, Colonial Ballroom West, Embassy Suites — *Tier 2 Publishers: An Endangered Species?* — Presented by **June Ellen Groppi** (Director of Marketing, University of Chicago Press), **Tracey Sutherland** (Executive Director, American Accounting Association), **October Ivins** (Consultant, Digital Content & Access Solutions)

Report by **Sandy Riggs** (SLIS Student, University of South Carolina) <sandyrusc@yahoo.com>

With a lot of audience participation, this session focused on the publishing for societies and scholarly associations, university presses, and the publishing industry on the whole. The speakers pointed out that university presses and commercial publishers are now competing for scholarly publications. They asked the audience what changes will occur if these journals are no longer produced by the scholarly societies. The audience members appeared to be a good mix of librarians and publishers and each group brought up valid points. One person stated that if libraries will just buy into the Big Deal, they will get their small journals. Someone else asked when everyone started expecting academia to pay for itself. Another audience member pointed out that authors usually won't publish in journals that can't be accessed electronically. The topics of usage data, costs per page, and counting were also raised. We were all reminded to be mindful of what's happening on both sides of the issue and that communication is a key factor in navigating these waters.

Session — Friday, November 4, 2005, Colonial Ballroom West, Embassy Suites — *The Big Deal and Its Impact on Innovation* — Presented by **Tim Ingoldsby** (Director of Business Development, American Institute of Physics), **Nick Evans** (Member Services Manager, Association of Learned and Professional Society Publishers (ALPSP)), **Tim Bucknall** (Assistant Director for Electronic Resources and Information Technologies, UNC-Greensboro), **Mike Casey** (Publisher, Now Publishers Inc.)

Report by **Sandy Riggs** (SLIS Student, University of South Carolina) <sandyrusc@yahoo.com>

The speakers discussed the Big Deal from their respective viewpoints. Key points made during the session included the following: the Big Deal does not always have to be such a \$BIG\$ deal; it is a buyers market and buyers must be specific about what they want and expect from the deals; large commercial companies can be forced by the market to innovate; smaller publishers can also find new ways to function (one example is publishing the material in book form rather than as a journal); and publishers shouldn't force libraries to take additional content that they don't want. The speakers appeared to be in agreement that the Big Deal does not stifle innovation.

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Session — Friday, November 4, 2005, Citadel Green Room North, Embassy Suites — **Got Databases-Now What?** — Presented by **Susanne Clement** (Head of Collection Development, University of Kansas), **Judy L. Johnson** (Coordinator of Acquisitions & Electronic Licensing, University of Nebraska-Lincoln), **Audrey Powers** (Research Librarian for the Sciences and Technology, University of South Florida)

Report by **Joslin Tepper** (USC Student)
<Coxje3@mailbox.sc.edu>

Each speaker discussed a different way in which their library was evaluating databases in order to decide whether to cancel them or not. They felt that it is important to develop a process to evaluate electronic databases in order to avoid duplication and lack of use of the databases, which would waste the ever shrinking library budget. Each speaker took a different approach to this. One developed a questionnaire that was sent to the faculty to determine what databases were used the most. Another developed a form that was used to review the databases. **Judy Johnson** from the **University of Nebraska** discussed how her university was in the very beginning stages of developing a way to evaluate their databases. The audience for this session seemed more interested in the results of the already completed ways to review databases from **Susanne Clements** and **Audrey Powers** than in how the beginning stages were done.

Session — Friday, November 4, 2005, Colonial Ballroom, Embassy Suites — **Engaging Your Community: Academic/Public/Special** — Presented by **Milton Wolf**, **Moderator** (Director Rita E. King Library, Chadron State College), **Robert Martin** (Professor and Lillian Bradshaw Endower Chair, School of Library and Information Studies, Texas Women's University), **Louise Blalock** (Chief Librarian, Hartford Public Library), **GladysAnn Wells** (Director, Arizona State Library, Archives and Public Records)

Report by **Lea Leininger** (Jackson Library, UNCG)
<laleinin@uncg.edu>

Professor Martin noted that we should market libraries by first asking the public what they need. Then we must discover our specific area of competence, because we will not be able to fulfill every need.

Ms. Blalock remarked that **Hartford Public Library** has not always engaged the community. Now library staff at all levels reach out by attending neighborhood meetings, etc. **Ms. Blalock** described programming, noting that it has become relevant to the community and well attended.

Ms. Wells discussed the programming role of state librarians, who provide training materials, seed money, and lots of help to the local librarians who run programs. **Ms. Wells** described the needs of several populations in Arizona, such as senior citizens and indigenous peoples.

Questions included "How is outreach administered? Did you have to cut back in other areas to support outreach?"

Ms. Blalock emphasized that outreach is part of HPL job descriptions, workweek, and performance evaluations. They have had to shift resources, so scheduling and the number of service points is different now.

Ms. Wells responded that the **Arizona State Library** had to "stop doing the 'little work' that people were attached to..."

Session — Friday, November 4, 2005, Colonial Ballroom, Francis Marion — **Getting Your Money's Worth - Beyond the Negotiations** — Presented by **Brenda Reeb** (Usability Coordinator, University of Rochester), **Roy Tennant** (User Services Architect, California Digital Library)

Report by **Clara B. Potter** (Assistant Dean for Technical Services, Camden-Carroll Library, Morehead State University, Morehead KY 40351) <c.potter@morehead-st.edu>

Roy Tennant and **Brenda Reeb** talked about maximizing online reference tools for access and increased use. Each presented checklists and scorecards to evaluate electronic purchases or to assist with access issues.

Tennant, of the **California Digital Library**, discussed deployment options, such as metasearch systems, embedding resources directly into course Web pages, organizing resources by topic areas, using descriptive titles rather than database names to present resources. His final word on the subject was that more is better, in terms of providing multiple pathways to resources. Completely transparent may be better for undergraduates, but faculty may want to know specifically what they are searching to know if they have exhausted a particular resource.

In terms of the technical scorecard for purchasing decisions, **Tennant** listed five issues, the first three of which he would consider deal-breakers: metasearch compliant (must have API), seamless authentication, durable URL for deep-linking to specific content within resources, graceful recovery, and fore-and-aft navigation.

Reeb, of the **University of Rochester**, focused on presentation. Her user interface scorecard includes: descriptive product labels (Education Journals and Reports rather than ERIC) link language carries over (if you are presenting Health information, call the linked item something having to do with health, rather than its trade name), user can explore site from metasearch or durable URL, proportionate real estate (giving the good stuff a more prominent position on the screen). She noted that traffic to resources can be increased by a significant magnitude depending on how the resources are presented.

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Session — Friday, November 4, 2005, Laurens, Francis Marion — *NISO Annual Meeting and Program* — Presented by **Pat Harris** (Executive Director, NISO)

Report by **Clara B. Potter** (Assistant Dean for Technical Services, Camden-Carroll Library, Morehead State University, Morehead KY 40351) <c.potter@morehead-st.edu>

Pat Harris, Executive Director of **NISO** opened the meeting by reporting that membership is at an all-time high, with 90 organizations as voting members. Membership has nearly doubled in the past five years.

Five important standards were released this year: **Z39.18** (Scientific/Technical Reports), **Z39.19** (Controlled Vocabularies), and **Z39.29** (Bibliographic References) were revised and refreshed; **Z39.84** (DOI Digital Object Identifier) and **Z39.88** (Open URL) were approved this year.

Pat Stevens, chair of the Standards Development Committee, walked through the life cycle of a standard, noting that **NISO** is one of the few organizations which provides long-term support for standards. In addition to those standards approved this year, **Z39.87** (Metadata for Still Images) is at the balloting stage, and the Metasearch Initiative is in development, with three groups working on access management, resource discovery, and search/retrieve.

Chair **Carl Grant** spoke of new strategic directions for **NISO**, including expanding the constituency, becoming more focused and proactive in standards development, and seeking new ways of funding the organization. Most of the changes were the result of a set of principles set out by a blue-ribbon panel whose report (available on the **NISO** Website) confirmed that **NISO** needs to take a new direction.

Session — Friday, November 4, 2005, Parkview Room, Francis Marion — *Alternatives to Licensing?* — Presented by **Selden Durgom Lamoureux** (Electronic Resources Librarian, UNC Chapel Hill), **Judy Luther** (President of Informed Strategies LLC)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

This early Friday morning session appeared only in the final program and it apparently was not anticipated that attendees would find or attend it. Au contraire! It had no competition (except continental breakfast)! The session, started in the Francis Marion (restaurant's) Parkview Room, became filled to overflowing and was moved by organizers to the Pinckney Room. **Judy Luther** (President of **Informed Strategies LLC**) and **Selden Durgom Lamoureux** (Electronic Resources Librarian, **UNC Chapel Hill**) presented arguments why the time may have come to adopt a "best practices document" instead of continuing to use the long and complex licenses employed currently. Attempts have been made — the "standard license," the "clear model license," the "short license." Points of contention? ILL, e-reserves, perpetual access, copyright, gross abuse of e-products (eg. hacking). Small publishers in the audience said they can't afford to hire large staffs, don't like licenses either, and "librarians are trustworthy." Librarians in the audience indicated they can't make promises regarding "their" users' behavior. "Non-profit institutions won't sue." One law librarian reminded (U.S.) librarians that we have 52 legal systems (federal plus District of Columbia). A conclusion of the speakers? "The more we talk about it, the more it begins to sound like a license"... Still, this topic proved popular and discussion should continue in the future...



Lively Lunch — Friday, November 4, 2005, Citadel Green Room South, Embassy Suites — *The Anatomy of Digital Product Development: A Pathological Look At Product Development For The Library Market* — Presented by **Nathan Norris** (Medical Librarian, Beth Israel Deaconess Medical Center), **Michael Simmons** (Library Manager, Sparrow Health System), **Stephen DeCroes** (Director of Sales, Marketing and Rights for McGraw-Hill Digital), **Meg White** (Executive Director, Digital Business Development, Rittenhouse)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

Session attendees ate lunch and listened to a collegial discussion of partners that were involved in the development, testing and bringing to market of a product (in this case of **R2 Library**, <http://www.r2library.com/>).

The "anatomy" analogy is that all partners are necessary to the "skeleton." **Nathan Norris** (Medical Librarian, **Beth Israel Deaconess Medical Center**) served as moderator. **Meg White** (Executive Director, Digital Business Development, **Rittenhouse**) shared a handout (to be sent to the Conference Website). Good business strategy emphasizes core competencies. Stakeholders should be brought into the process early. Develop a prototype. Pilot test. Don't rush to market if the product isn't ready, but some enhancements can be added later. **Stephen DeCroes** (Director of Sales, Marketing and Rights for **McGraw-Hill Digital**) indicated that for some partners (such as **McGraw** in this case), partnering was convenient and fit the mission statement — this was a partnership opportunity that helped maximize market penetration at the brand and content level. All the same, **McGraw** still develops its own technology products for its content. **Michael Simmons** (Library Manager, **Sparrow Health System**) participated in the project since it showcased the library and he remained neutral, making no product commitments. His advice ("take-aways"): formalize the relationships, ensure that collaboration spans across the development cycle; all partners must recognize the time commitment; avoid being vague; include the end-user when possible. Discussion ranged. Differences were illuminated: online (eBook) content providers vs distribution platforms.

Session — Friday, November 4, 2005, Carolina Ballroom, Francis Marion — *The End of Libraries As We Know It, Or Why There's Never Been A Better Time To Be A Librarian* — Presented by **T. Scott Plutchak** (Director, Lister Hill Library of the Health Sciences, University of Alabama at Birmingham)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

The first Friday morning plenary session speaker, **T. Scott Plutchak** (Director, Lister Hill Library of the Health Sciences, **University of Alabama at Birmingham**) used his background (as library director, philosophy undergraduate degree major and six-year tenure as *Journal of the Medical Library Association* editor, etc.) to provide inspiration and a historical perspective going back 500 years. The library profession's essence is not in building and managing collections or managing libraries, but the more fundamental and format neutral "getting people to the information they need" (**Nina Matheson's** "knowledge managers"). December 15, 1994 was a ground-breaking day, when **Netscape** first became publicly available, taking it out of the hands of the private club (geeks and a few librarians), transforming communication. The "end of libraries" should be the end of what confines and constrains us... **Plutchak's** recommendations? Relationships are key, a library is not an end unto itself, learn about the business of publishing, be bold (gamble and take chances), be

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excited (reinvent the profession), and “words matter” (don’t limit ourselves and our imagination). The talk prompted audience members to step to the microphone: is our model like the Visiting Nurse Associations of America? (yes). Should the title of the profession be changed? (no — **T.S. Plutchak** is 100% committed to being a librarian). Part of being bold is sometimes upsetting people. In recruiting an entry level professional, seek a “type of person” who will have energy, excitement, and desire for understanding how organizations work. (One speaker representing a group listening in a “spillover room” shared his thought that “socially disabled people” should not be out on the front (service) lines in libraries...)

Session — Friday, November 4, 2005, Gold Ballroom, Francis Marion — **Identifying Open Access Articles: Valid and Invalid Methods** — Presented by **David Goodman** (Associate Professor, Palmer School of Library and Information Science, Long Island University), **Kristin Antelman** (Associate Director for Information Technology, NCSU Libraries), **Nisa Bakkalbasi** (General Science Librarian, Yale Library)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

Of the three scheduled session speakers, **David Goodman** (Associate Professor, Palmer School of Library and Information Science, Long Island University) was the only one who came to “carry the ball” and “share the wealth.” Co-authors, **Kristin Antelman** (NCSU Libraries), and **Nisa Bakkalbasi** (Yale Library), were unable to attend but were credited for their contribution. This research sought to investigate OA literature, its — “findability,” “linkability,” % of total articles, OA advantage, and the increase in citations due to open access literature publication. Other authors’ studies since 2001 have honed in on conference proceedings and specific subjects (astronomy, social sciences, areas of medicine, etc.). The **Goodman** et al research was done on algorithms and authenticity, finding: “dubious OA,” “non-OA” (misidentified OA), false positives, false negatives, “version problems” and highlighted the accidental nature of some automated system findings... This research is currently hard to do elegantly and requires manual analysis and well-defined fields. **D. Goodman** had some “fun” and easy to understand analogies and critiquing studies, in this otherwise “data-dominated” session. For one biology study, it would be analogous to going to a record store, asking for **Beethoven** and getting the **Rolling Stones**. For one sociology study, it would be like asking for classical music, and getting it only half the time, and rock music the other time. Search engines of acceptable accuracy have to be developed and tested. **D. Goodman** indicated that his group’s research results will be distributed in the future.

Session — Friday, November 4, 2005, Gold Ballroom, Francis Marion — **Measuring The Quality of Research Output In A Changing World** — Presented by **Leo Walford** (Associate Director, Journal Publishing, Sage Publications), **Colin Steele** (Emeritus Fellow, Australian National University), **Patricia Brennan** (ISI Thompson Scientific), **Jerry Cowhig** (Managing Director of Institute of Physics Publishing)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

This session’s “changing world” involved the growth of the speakers’ roster from two listed in the program (**L. Walford** and **C. Steele**) to the four reported on here... **Leo Walford** (Associate Director, Journal Publishing, Sage Publications) observed that the fruits of research take a long time (e.g., *Dictionary of National Biography*). Panels evaluating output commit to reading everything (but do they?). There are internal

and external measures-peer review practices, faculty list appearances, sales, impact factors. Publishers are not in the position to say what quality is. We need to justify what we want to ensure. Quality will array naturally, and good material will bubble up. **Patricia Brennan** (ISI Thompson Scientific) shared some ISI activities in this arena — Web Citation Index (partnering with institutions having repositories); analyses of Open Access publishing impact; trend monitoring at the institution and funding agency level (paper, patent and other output; forces driving competition; star faculty, aligning patents and innovations with investment strategies). **Jerry Cowhig** (Managing Director of Institute of Physics Publishing) observed that medicine and humanities have a “softer side” where measurements cannot be made easily. The output quality measurement system should have a method and be: universal, audited, published. It is not librarians who “abuse” impact factors, but those higher up who seek a simple answer. **Colin Steele** (Emeritus Fellow, Australian National University) discussed the humanities world, providing global perspective (China, Canada, Australia, U.K.) Popular academic rankings schemes are often not very scientific and may skew to a particular field. In the humanities, the challenge is how to “judge” output and quality — of an orchestra, an art gallery. “Output” includes contribution to an encyclopedic work and e-research. The audience, though not large, stayed to contribute its “two cents.” There is a cycle — those who already are doing research get more funding... Different disciplines value different output. In some foreign countries PhD students are instructed to choose high impact English language journals on which their compensation may then be based. U.S. researchers publish in foreign literature. Some methodologies measure “best outputs” not “all outputs.”

Table Talk — Friday, November 4, 2005, Embassy Suites Atrium — **HINARI** — Presented by **Leo Walford** (Associate Director, Journal Publishing, Sage Publications)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

At the new **Charleston Conference “Table Talks”** in the new **Embassy Suites Atrium** venue, a group gathered to discuss the international WHO project, **HINARI** (<http://www.who.int/hinari/en/>), **Health InterNetwork Access to Research Initiative**. The facilitator, **Leo Walford** (Associate Director, Journal Publishing, Sage Publications), provided background. Phase 1 began in January 2002 (six biomedical publishers), **Sage** joined as a partner in the Phase 2 in 2003 (publishers number over 70 now). **HINARI** focuses on STM literature, while its agricultural counterpart is **AGORA**, <http://www.aginternetwork.org/en/>. Publishers’ income is derived from developed countries, so **HINARI** does not impact participating publisher profits. The project aims to provide an evidence base for research in developing countries (based on GNP), decrease isolationism & brain drain of scientists. Library partners provide expertise, e.g., **Yale** assists with maintaining the Website behind the portal, and **U.S. National Library of Medicine** provides linking from **PubMed** to full-text of publishing partners’ journals. Discussants, some with “inside knowledge” as **HINARI** partners, ignored murmurs of nearby table talks, and in this low-tech venue, expressed enthusiasm about the international public-private partnership of this high-tech information initiative that empowers developing country scientists. **Leo Walford** predicted that **HINARI** will not go away after its initial term concludes December 2006.

Beastly Breakfast — Saturday, November 5, 2005, Gold Ballroom, Francis Marion — **Google Print and Its Implications for Libraries** — Presented by **Mark Sandler** (University of Michigan)

Report by **Adrienne N. Fallaw** (University of South Carolina, School of Library & Information Science) <adriennefallaw@yahoo.com>

Mr. Sandler facilitated this session and encouraged an informal dis-

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cussion between members. It was well attended, and this forced the group to move to a bigger facility ten minutes after its start to accommodate all participants. Although most were academic librarians, there were a few publishers in the group, which provided for a lively discussion. Some concerns discussed included the possibility of becoming a fee-based project and squeezing out local digitization projects. Other discussions focused on fair and transformative use, as well as relationships between commercial publishers and libraries. **Mr. Sandler** emphasized that accessibility of information is the most important consideration, regardless of **Google's** decision.

Session — Saturday, November 5, 2005, Laurens, Francis Marion — *Metro-Goldwyn Mayer Inc., et al, Petitioners v. Grokster, Ltd., et al* — Presented by **Bruce Strauch** (Professor, The Citadel)

Report by **Elizabeth R. Lorbeer** (Assistant Director of Collections Management, Rush University, Chicago, Illinois 60612) <elizabeth_r_lorbeer@rush.edu>

As I watched **Bruce Strauch** draw on the white board, he explains how technology has other intended uses and some "student living in their parent's basement" will exploit for their own benefit. This is the second year I have attended **Strauch's** discussion on legal issues affecting libraries. His lively commentary includes him drawing pictures of his subjects while humorously explaining the complexities of a case. The discussion focused on college students swapping music and the **Supreme Court** ruling on contributory copyright infringement.

Session — Saturday, November 5, 2005, Rutledge, Francis Marion — *Using Citation Analysis to Assess Approval Plans and Online Subscriptions to Meet the Research Needs of CYS Students* — Presented by **Lia Hemphill** (Nova Southeastern University), **Johanna Tunon** (Nova Southeastern University)

Report by **Adrienne N. Fallaw** (University of South Carolina, School of Library & Information Science) <adriennefallaw@yahoo.com>

The speakers co-presented their study to determine if students' reference lists could be used to document acquired library research skills, and from their examination, they discussed the feasibility of citation analysis to be used for assessing approval plans and online subscriptions. They highlighted the various research questions, citation categories, limitations, and problems of the study. Also discussed were percentages and distributions of citations, as well as an analysis of publication counts and the most cited book titles and authors. Results from the study suggest that students conduct their research based on what is easy to retrieve online. Due to the large amounts of statistical data discussed, it was particularly useful for the presenters to distribute copies of their **PowerPoint** presentations to the audience to follow throughout the discussion.

Session — Saturday, November 5, 2005, Gold Ballroom, Francis Marion — *Random Acts of Literacy: Releasing Books into the Wild Via www.bookcrossing.com* — Presented by **William P. Kane** (Regional Sales Manager, Alibris for Libraries)

Report by **Martha G. Scott** (Student, University of South Carolina) <mg7scott@yahoo.com>

What a wonderful, easy and practical way for a library outreach

program to promote literacy! **BookCrossing** is a concept which only requires paperbacks, duplicate books and perhaps discards weeded from the library. Next comes signing up for a free account at <http://www.bookcrossing.com> where information for joining, directions for registering books, labeling books, and advertising are a click away. Labels are available for downloading; affix those to the books clearly so there will be no confusion as to which books belong to the library and then pick an area for placing the books for their traveling adventure. What fun! There was a table of many books with the **BookCrossing** labels on them that the group was asked to take as many as they wanted, and we did. It was interesting that the moderator was from **Alibris**, and that company does not have any business interests or anything to do with the initiative.

Beastly Breakfast — Saturday, November 5, 2005, Gold Ballroom, Francis Marion — *Book To The Future? 21st Century Models For The Scholarly Monograph* — Presented by **Colin Steele** (Emeritus Fellow, Australian National University)

Report by **Sandra A. Beehler** (Acquisitions/Collection Development Librarian, Aubrey R. Watzek Library, Lewis & Clark College) <beehler@lclark.edu>

This breakfast meeting was a follow-up to the talk given by **Colin Steele** at the Plenary Session on Friday morning in which he traced the development of monograph publishing from the invention of the printing press in 1500's to the current electronic publishing environment. He sees a return to local ownership of university research output, utilizing electronic publishing to lower costs and ensure wide distribution. Electronic publishing also makes accessible research that would not be commercially viable, but is still useful information. It was agreed that critical mass will not be reached until accreditation bodies and tenure review processes recognize the value/credibility of e-publishing. Longevity and archiving of electronic information are also issues that have not been fully addressed. Pinpoint searching capability must also be developed.

Beastly Breakfast — Saturday, November 5, 2004, Gold Ballroom, Francis Marion — *Measuring Success and Comparing Ourselves In An Internet Age* — Presented by **Stephen Abram** (Vice President of Innovation for SirsiDynix), **Dr. Robert E. Molyneux** (Chief Statistician, SirsiDynix)

Report by **Ramune Kubilius** (Galter Health Sciences Library, Northwestern University) <r-kubilius@northwestern.edu>

The **Charleston Conference** program listed the facilitator of this "Beastly Breakfast" session as **Stephen Abram** but it turned out to be **Dr. Robert E. Molyneux** (Chief Statistician, SirsiDynix) who led an informal discussion continuing the thread of Friday's plenary session in which both had presented. **B. Molyneux** shared analogies about the nature of data: was the Garden of Eden a case of bad data? Should milk be added before or after pouring tea? (a la **R. A. Fisher**, the "father of statistics"). Discussants talked about failed statistical standardization attempts (made by librarians that did not bring publishers on board), user ratios, milking the distribution curve's "upper tail." Our culture does not like to criticize. Statistics have intrinsic and extrinsic value... Library and institutional decisions may be made for political reasons that misread, ignore or hide statistical data. Librarians tend to look at particular cases, statisticians at trends. Some libraries appoint "institutional resource" staff to fill out statistical reports, but according to **B. Molyneux**, there is still a great need for more professionally trained statisticians in the library and information industries — to measure and fix "broken" or non-existing data series. The discussant group was small, the discussion anything but dry and analytical.

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Session — Saturday, November 5, 2005, Carolina Ballroom,
Francis Marion — *How Do We Know Who We Are?*
The Problems of Identifying Users — Presented by
Helen Henderson (Managing Director, Ringgold Ltd),
Jim Mouw (Assistant Director for Technical and
Electronic Services, University of Chicago),
Richard Gedye (Sales and Marketing Director,
Oxford University Press), **Patricia Harris**
(Executive Director, NISO)

Report by **Ramune Kubilius** (Galter Health Sciences Library,
Northwestern University) <r-kubilius@northwestern.edu>

Patricia Harris (Executive Director, NISO) and speakers, **Jim Mouw** (Assistant Director for Technical and Electronic Services, University of Chicago) and **Richard Gedye** (Sales and Marketing Director, Oxford University Press) shared insights on the challenges presented in a world in which publishers, providers and users have problems identifying each other. There are changing names and ownerships, wrong or insufficient information, inconsistently used abbreviations. Per **J. Mouw**, the problem is determining “what is what and who is who.” There are many identifiers (NUC, OCLC, RLIN, zip code, agent, etc.), a variety of authentication measures, and the fact is, “libraries are neither digital, nor objects.” **R. Gedye** shared publishers’ view that the benefits to seeking standardization in institutional identification include providing accuracy for: pricing, holdings, lists of subscribing “children” and their “parents,” market reporting, marketing... **P. Harris** mentioned a number of existing standards organizations and identifiers. The aim should be to create a central database of identifiers with authoritative metadata, make it available and encourage its use by all players in the supply chain. **Helen Henderson** (Managing Director, Ringgold Ltd, <http://www.ringgold.com/>) indicated that the problems emerged at the start of her career and she is hopeful that they will be solved by the time she retires. The “right people” could work on this and results can be scaled over time. Audience members shared opinions: existing systems don’t compete, but have different functions and populating the database is the initial challenge...

Session — Saturday, November 5, 2005, Carolina Ballroom,
Francis Marion — *Secondary Publishing Services:*
A Bend In The Road — Presented by **John Regazzi**
(Dean, Long Island University)

Report by **Rebecca Kemp** (Serials / Electronic Resources
Librarian, University of North Carolina Wilmington)
<kempr@uncw.edu>

John Regazzi contrasted the historical communication chain of published information with the new chain that has emerged in the era of various abstracting and indexing tools and full text providers. Over the years, more intermediaries have been imposed on the information as it travels between author and reader. Now, with the increasing use of search engines as another intermediary, **Regazzi** recommended that abstracting and indexing services partner with search engines in order to create focused databases for particular groups of users. Abstracting and indexing companies could provide excellent knowledge of the content, and thus provide insight into what users want to find, while search engines could provide increased searchability of that value-added content. **Regazzi** also noted that federated searching will become more critical, as the number of information resources continues to grow.

Session — Saturday, November 5, 2005, Pickney,
Francis Marion — *Collaborative Electronic Resource*
Leadership: Creating Dialog in Times of Tech-Stress —
Presented by **Joan Conger** (MLIS, MA.OD.)

Report by **Kristen DeVoe** (Pittsburg, PA)
<kedevoe24@yahoo.com>

Joan Conger began this presentation on collaborative leadership by discussing the differences between *management* and *leadership*. Management is a supervisory, reactive approach to decision making based on a preconceived plan. Leadership is a collaborative and adaptive approach based on core values and a central purpose. **Conger** continued the presentation with further discussion on the principles of collaborative leadership in libraries and other organizations, and how applying these principles to organizational processes can ultimately lead to outcomes such as stronger budgets, better relationships among staff, and happier customers/users. Attention was given to how principles of collaborative leadership, such as distributed power, relationship building, active participation, and energized learning can increase effectiveness throughout the institution. The session ended with a group activity designed to introduce the audience to how collaborative leadership can work in their own institutions. Further information on collaborative leadership and how it can be applied to electronic resources in libraries can be found in **Conger’s** book *Collaborative Electronic Resources Management: From Acquisitions to Assessment*. Englewood, CO: Libraries Unlimited, 2004.

Session — Saturday, November 5, 2005, Carolina Ballroom,
Francis Marion — *Should The Present Structure of Science*
Publishing Be Continued? — Presented by **Chuck Hamaker**,
Moderator (AUL Collections and Technical Services,
UNC Charlotte), **Peter Banks** (Acting Vice President for
Publications/Publisher, American Diabetes Association),
David Goodman (Associate Professor, Palmer School of
Library and Information Science, Long Island University)

Report by **Heather Miller** (SUNY-Albany)
<hmiller@uamail.albany.edu>

Basing their points on a 1997 article by **F. Rowland** who defined the functions of the scholarly journal as dissemination of information, quality control, a canonical archive and recognition of authors, **Banks**, a proponent of traditional publishing mechanisms, and **Goodman**, a proponent of open access (OA) publishing, debated the following points:

Does the present structure of scholarly communication assure adequate distribution? While both agreed that more research is needed to determine how well OA will work, **Banks** stated that for distribution, traditional publishing works; it is bigger and faster and is an economic model that supports peer review. **Goodman** countered that many people are not part of the mainstream and that the process is much simpler without a distribution and authorization chain between the author and the reader.

Does the present structure of scholarly communication assure return on investment? **Banks’** answer was “yes,” an ongoing return is a basic criterion of successful scientific publishing, resulting from attention to a basic business model, which many OA journals lack. **Goodman** noted that both he and **Banks** agree that if OA journals could be funded adequately, it would be a good model, and both are dissatisfied with present OA business models, but there are reasons other than the bottom line for wanting to be a publisher. OA journals can be non-profit and could be subsidized by a university or society. He pointed out that by eliminating ancillary activities, an OA journal would not need much surplus over costs. And, if the current model collapses, as he believes it will, post-print peer review will take over, but **Banks** said that this is not adequate for clinical subjects.

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President and CEO, EBSCO Industries, Inc.

by Katina Strauch (Editor, *Against the Grain*) <kstrauch@comcast.net>

ATG: *Congratulations! We understand that as of July 1, 2005, you became the third individual in EBSCO's 62-year history to serve as president. In practical terms, how has your life changed?*

FDB: As you know, I served as EBSCO's chief operating officer for one year prior to becoming president. During this time, I worked closely with **Jim Stephens** to learn the components of our company with which I had not directly worked. This included several divisions within the **EBSCO Industries' Manufacturing Group**, specifically commercial printers **EBSCO Media** and **Tinker Business Forms**, literature display provider **Vulcan Industries**, looseleaf binder and information packaging provider **Vulcan Information Packaging** and sign sales manufacturer **Wayne Industries**.

Prior to this transition, I had the responsibility of managing the General Services Group, which encompasses insurance company **S.S. Nesbitt & Co.**, magazine publisher **Grand View Media Group**; magazine subscription services through **EBSCO Reception Room Subscription Services**, **EBSCO Magazine Express** and **Vulcan Service**; military products and services through **Military Service Company**; printing/binding/laminating equipment and supplies through **NSC International**; promotional merchandise through **EBSCO Promotional Products**; and publishing-related services **MetaPress**, **Publisher Promotion & Fulfillment**, **EBSCO Consumer Magazine Services**, **Publishers' Warehouse** and **EBSCO TeleServices**.

In addition, I managed the **EBSCO Subscription Services (ESS)** component of **EBSCO Information Services (EIS)**. This is EBSCO's largest division (with more than 1,800 employees across 32 offices in



20 countries around the world), and it has been a demanding job. On July 1, 2004, **Allen Powell** assumed that management role, and this has made a big difference in the adjustment period to my new responsibilities as president and CEO of **EBSCO**.

In practical terms, my professional concentrations have shifted somewhat with the new management responsibilities, but the basic, day-to-day tasks are the same, if not at a more demanding pace. The ultimate goal is to ensure long-term stability through strategic growth and conservative management of financial resources. This has been one of the keys to **EBSCO's** formula for success for more than 60 years. It's my job to make decisions that support this philosophy to ensure that our company continues to thrive.

ATG: *J.T. Stephens has said that he is delighted that you "come from within." J.T. Stephens, by his own admission, did*

not manage precisely as his father did. How will your management style and results leadership change from those of Elton Bryson Stephens and JT Stephens?

FDB: Time will tell.

Since **EBSCO** was established in 1944, our company has evolved into a large, diverse and complex organization. We know that we are only as strong as the people who work for us, and for more than six decades we've been diligent in hiring numerous talented and capable individuals. Just as I will rely on **Allen Powell** and his team to effectively guide the **EIS** division, I expect to follow that same approach with other areas of the company. This philosophy — that the right people are the difference — is one of our core values. It is woven into the cultural fabric of the company, and the effort has resulted in explosive growth: our global workforce now includes 5,100 employees.

Empowering our employees to take initiative and exceed service expectations has rewarded us exponentially. It's one of the reasons that more than 130 professionally-trained librarians have come to work for us, and that more than 180 employees have been with the company 25 years or more. The retention and caliber of **EBSCO** staff are excellent indicators that the current management philosophy works.

Another one of our strengths is in the company's decentralized structure. Take **EBSCO Information Services**, for example. Each of the division's 32 regional offices worldwide is staffed with personnel who speak the local language and understand the particular challenges faced by librarians in their areas, offering a uniquely personal level of service. This illustrates

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Who is responsible for publishing? **Goodman** stated that it is the responsibility of whoever funds the research, but **Banks** disagreed strongly, objecting to tax payer support. Instead, publishers are needed to publish. **Goodman** noted that some structure is needed, but it could be done for half the present cost. Academic administrators should arrange it; only authors and readers matter.

Who is responsible for archiving? **Banks** supported the current distributed model of archiving paper journals where there are numerous separate collections, saying it is everyone's responsibility. **Goodman** agreed that redundancy is a necessary safeguard

and said that arranging it could fall to national libraries. **Banks** noted that archiving and OA are separate issues and that OA does not solve the archiving question. **Goodman** agreed, but noted that OA permits individuals or groups to create archives without having to administer user restrictions. Both agreed that currently many versions of the same article are being archived resulting in lack of an authoritative version. **Goodman** noted that there is a great need for improved secondary services such as indexing. **Banks** stated that OA is not sustainable; it puts the government in control of the flow of information to which **Goodman** responded that the government does that now by controlling funding. Both agreed that readers and authors come first, but **Goodman** fears that we will not have enough time to develop a new model. 🐼